

UUFCC PRIORITY GOALS 2011-2016

This Long Range Plan (LRP) represents the participation and input of many friends and members of the UUFCC. Specific details about the LRP for program and administrative activities can be found in the body and appendices of this document. This document should be considered a guide, or starting point, from which to proceed in shaping the next five years (2011-2016) at the UUFCC, not as the final authority in the execution of our plan.

The LRP reflects a process in which members and friends of the UUFCC were invited to participate. There were numerous open meetings, several of which focused on input for a new UUFCC vision statement. A second series of meetings provided an opportunity for congregants to comment on a draft vision statement and draft goals for the next five years. Committees, groups, the Program Council, and the Board were asked to provide their group's long range plan.

From this process, the LRP committee identified several overarching goals. These goals reflect an underlying sentiment, a sense of direction to guide the UUFCC leadership during the next five years as we "walk into our future."

Vision: To create a better world through our open minds, helping hands, and loving hearts.

1. Continue to build on our current financial successes. Recent annual budget drives have been measured by greater recognition of individual member's financial responsibility, a greater appreciation of the relationships we've developed in meeting our financial challenges together, and increasing financial commitments. We have taken this opportunity to begin a much needed building expansion. Continued success will depend on serving the needs of our community, an organized financial team, and effective year-round stewardship.
2. Develop a more thoughtful approach to Fellowship life. More profound individual and group experiences will depend on deliberate planning. This will include nurturing a healthy congregation, thoughtful use of our building, developing unifying themes (perhaps annually) for congregational activities, effective communication within the Centre County community, deliberate leadership development, and more. This should be coordinated and shepherded by a year-round active LRP committee.
3. Establish the position of Membership Coordinator. This position will be essential to successful coordination of activities across programs, development of effective all-congregational activities, maintaining relations with the UUA, and effectively engaging Fellowship members and friends with the surrounding Centre County community.
4. Create intentional multigenerational connections within the Fellowship through various activities such as worship services, service projects, retreats, and picnics.
5. Develop a deliberate approach to our activities in the Centre County and larger communities. This might include developing and maintaining a list of volunteer activities, multigenerational opportunities, campus ministry, interfaith efforts, expanding community use of our building, UUFCC advertising, and working for peace and justice in the larger world. This effort should be a planned and coordinated effort within the Fellowship.

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EXECUTIVE SUMMARY

The Unitarian Universalist Fellowship of Centre County (UUFCC) was founded in 1950. From an original membership of 14, we currently include 274 members. We have a beautiful Fellowship Hall and campus, and many UUFCC friends and members support and participate in community-organized programs and activities. We have a fulltime Minister, a full time Director of Religious Education (DLRE), a part-time Music Director, and part-time Office Administrator who all serve and lead our community.

The Last Five Years: 2006-2011

Over the past five years, the Unitarian Universalist Fellowship of Centre County has addressed many of its needs as a growing organism, many of which were outlined in the long range plan of 2006-2011. With the input and work of many friends and members, we accomplished four of the five priority goals:

1. We improved financial management by doing the following:
 - Reorganizing the Finance Committee
 - Revising the budgeting process to include input from committees and the Program Council at two levels: basic and dream
 - Including a building reserve and keeping a mortgage-like item (once we paid off the actual mortgage) in the Annual Budget
 - Operating within a balanced budget over the past two years
 - Reorganizing the Annual Budget Drive Committee
 - Revising the Annual Budget Drive to include more people in raising funds for operations
 - Expanding the number of year-round fund-raising activities
2. We changed the governance structure of the Fellowship by establishing a Program Council that concentrates on the day-to-day operations (i.e. programs) of the Fellowship, and by changing the primary function of the Board of Directors to one of leadership and strategy.
3. We developed an active Lifespan Religious Education (LRE) program on Sunday mornings, called LifeSpan Learning Hour, that reaches many members and friends with a variety of programs, some one-time, some multi-week. We also offer LRE programs during Wonderful Soulful Wednesdays and Family Night, as well as a Meditation Group twice monthly.
4. We are in the process of establishing the position of Membership Coordinator, so this goal will be included in the new long range plan.
5. We voted in November 2010 to proceed with the building expansion in order to provide adequate space for the members and programs of the UUFCC.

Much of the work over the past five years concentrated on improving our infrastructure to support our thriving and growing beloved community. Now that the infrastructure is in place,

we are in a position not only to continue serving our members and friends but also to increase our work in the larger community. Our priority goals for the upcoming five years reflect this and are, in some respects, more general and strategic in nature.

Developing the Current LRP

The process of developing the current LRP has been generally well-received, with active participation by a cross-section of friends and members. A new vision statement was developed through four all-congregation meetings. Most committees developed individual LRPs, as did the Board, and individual activity groups. (We did not receive reports from the Technology Committee or Program Council.) Budget projections relied heavily on historical trends based on actual UUFCC data from 1992 to 2010.

This LRP specifically addresses the UUFCC Programs, Administration, and Organizational Structure.

Our Programs represent activities important to our community. Religious Education plans to create greater congregational ownership in the lifespan education program. Community Life & Fellowship Relations plans to increase participation of all friends and members in our community. Social Action & Outreach will improve participation by many friends and members. Sunday Services & Music desire to develop services that continue to meet the individual and collective needs of the community, expand an already exciting music program, and to increase the Music Director position from ¼ to ½ time. Successful implementation of Programs' LRP should encourage membership growth and retention.

Administration includes Personnel, Property, and Finance. We hope to fund a Membership Coordinator position, a goal carried over from the last long range plan. To encourage retention of current personnel, we hope to maintain salaries at UUA Fair Compensation guidelines. Additional personnel will be required to meet the needs of a growing Fellowship. In addition to maintaining our current building and grounds, building expansion has long been identified as a priority to address space issues. We have finally started the process of building an addition to our current building. Fiscal responsibility will depend on sound financial planning, so a permanent Finance Committee will be necessary. Since 1983 our membership has increased at a net rate of 4.6 members per year and financial commitments have steadily increased during the last five years. Based on the historical growth in membership, recent successes in increasing financial awareness and corresponding increase in financial commitments, and conservatively high estimates of expenses, projected expenses for the next five years should be matched by a corresponding increase in income (i.e. balanced budget, or nearly so).

The current UUFCC governance structure is consistent with a "Program" size (150-300 worship attendance) congregation. Based on the last LRP, the governance structure was reorganized to better serve this larger community. The Board was reorganized and a Program Council added, along with a Stewardship Committee to better support successful growth and financial responsibility. It was recommended that a paid position of Volunteer/Membership Coordinator (described as Membership Coordinator in this LRP) be added to the staff; it was the only goal not accomplished and is carried forward into the current set of goals.

INTRODUCTION

Brief History

The Unitarian Universalist Fellowship of Centre County (originally known as the Unitarian Fellowship of Centre County) was formed in the spring of 1950. The original group included 14 members. Services were held in members' homes for a few months before gatherings began at the Friends' Meeting House. By October, 1951, meetings were conducted on a bi-weekly basis. Within two years, weekly meetings began. Sunday school was initially held jointly with the Friends. In time, the Unitarians decided to meet at the Odd Fellows Hall, and have a separate Sunday school under the directorship of Mary Oliver. Membership quickly doubled.

Groundbreaking for the Unitarian Chapel was held on May 12, 1959. The building was occupied by the next spring. It cost about \$35,000. With growth of the small Fellowship, there was need for a larger space for religious education (RE). A second building on Glenn Road was constructed in 1965 for the RE program. In November of 1970, the Fellowship voted to call its first minister. In August, 1991, we moved into our current building, which is situated on about five acres. In 2000, Mark Hayes answered our call to be our current settled Minister. Lois Durran was the first Music Director, augmenting an emphasis on aesthetics long favored by the Fellowship. In 2005, Jean Wiant became our first full time Director of Lifespan Religious Education. In 2010, Matthew Sheppard was hired as the Music Director.

Currently, we have 274 members in the Fellowship and 58 children enrolled in the RE program.

Our Legacy

Our current building is situated on an attractive campus, with a beautiful sanctuary and a wonderful view of Tussey Mountain from inside and outside the building and a wonderful view of Bald Eagle Mountain from outside. The RE classrooms are sometimes crowded with children, which has been discussed in the context of building expansion for several years. This effort is now underway with plans to break ground for a new building sometime in the second half of 2011.

Fellowship activities continue to grow. Under the umbrella of the Social Action Committee, several task forces have been set up, including task forces for the environment, Habitat for Humanity, and for children. Members of the Fellowship have planned and carried out several social justice trips to Puerto Rico, New Orleans, and (closer to home) Bellefonte. These trips focused on social justice projects and have been highly successful. Our programs are diverse, providing opportunities for friends and members to participate in many community activities, including such activities as Small Group Ministry, Dinner Club, TGIF and Family-Friendly TGIF, Wonderful Soulful Wednesday, 4th Wednesday Game Night, and many others (a more comprehensive, but not exhaustive, list appears in Appendix Q). An integral part of our history is the diversity of activities undertaken both by individuals from the Fellowship as well as those task forces with a mandate from the Fellowship. Through these efforts we have joined with other individuals and other faith communities in the State College area as a way of letting our presence be known.

Long Range Planning Process

The current LRP Committee includes: Martha Butler, Sarah Diaz, Mark Hayes, Amanda Richards, Stevie Rocco, John Schmidt, Darlene Weener, and Jean Wiant.

The LRP Committee was charged by the UUFCC Board to develop an updated LRP report and to develop a new vision statement. The most recent comprehensive LRP report was developed in 2004-2005. It is worth noting that the Fellowship achieved all the goals from the previous LRP, except for hiring a Volunteer Coordinator; this goal remains a priority item and is carried into the goals for the current LRP.

The LRP process began in the fall of 2010 with a program called “WHHUU: Who we are. What We do. How we are going to do it better at the UU.” This took the form of presentations and discussions about various programs, functions, and activities at the Fellowship, such as the history of the UUFCC, its mission, vision, covenant, and board-related topics. WHHUU followed an appreciative inquiry format, discussing what the Fellowship does well, how we might do these things better in the next five years, and exploring the idea of what it means to be a Unitarian Universalist.

After this initial phase, WHHUU was reorganized in the late winter to a smaller group tasked to work with the committees and activity groups to create the long range plan. In January 2011, the LRP began the year with a service entitled “Building the Beloved Community.” Its purpose was to celebrate the Fellowship and inspire the congregation to think about the importance of our relationships and community as we developed the long range plan. In February, the LRP began work on the new vision statement. The committee developed three questions, designed to elicit what congregants and friends valued about the Fellowship:

1. How has the Fellowship changed you?
2. How do you change the Fellowship?
3. How does the power of the Fellowship change the larger world?

We held four all-member brainstorming and feedback sessions focused on these questions. There was good participation from a wide cross section of the congregation. Stevie Rocco entered the feedback into a software program which created a “word cloud” where the words that appeared most often were largest in size. This proved to be an exceedingly useful tool in creating the vision statement, as it was easy to see which concepts appeared most often. The committee then drafted the following vision statement:

To create a better world with our open minds, helping hands, and loving hearts.

The committee circulated the statement for feedback and it met with a good reception. It was then circulated to the committees, group activities, Program Council, and Board to help them in developing their individual long range plans. We also provided a template for the committees to use (the appendices of the previous plan) in developing their plans. These LRP reports are summarized in the main text of this LRP report and included in their entirety as appendices.

The LRP committee then distilled all the goals into major goals for the congregation. We then held four all-congregational meetings where we reviewed the goals and collected feedback. Comments on a draft LRP were solicited from the entire congregation through electronic and hard copy distribution of the document. The Board provided input and reviewed the draft LRP prior to a congregational vote in May 2011.

Note: The LRP committee recommends that each committee incorporates a yearly goal review step as part of its report submitted for the Annual Report. Each committee should review its goals yearly, retire goals as they are achieved, and recommend new goals. Revisiting the goals annually and updating resource requirements should then flow into the overall financial management and stewardship of the Fellowship.

Mission, Vision, and Covenant

The current UUFCC Covenant and Mission Statements, endorsed by the congregation in November 2000, are:

Our Covenant: We, the members and friends of the Unitarian Universalist Fellowship of Centre County, covenant to: come together in a spirit of trust and respect; to love, listen, cry, and laugh; shaping a mutually supportive community that nurtures our minds and spirits, and celebrates the worth and dignity of us all. We commit ourselves to do this with caring, compassion, and understanding through open, honest communication.

The Mission of the Unitarian Universalist Fellowship of Centre County is to: articulate and promote liberal religion, provide a spiritual home for persons who seek to know the truth for themselves, and inspire and empower individuals to live out their values and principles in the community, both within and beyond our walls.

The proposed Vision statement is as follows:

The Vision of the Unitarian Universalist Fellowship of Centre County: To create a better world with our open minds, helping hands, and loving hearts.

PROGRAM PLAN

The program plan represents those congregational activities important to the friends and members of the UUFCC. By our actions we express who we are. A vision of our desired program is represented here. Detailed goals, and plans to achieve those goals, are presented in the corresponding appendices.

Religious Education

1. Improve the integration of the children and youth with the other religious and social activities of the Fellowship through increased communication and renewed commitment to their growth and well-being.
2. Continue to build upon and improve the quality of the religious education program through enhanced curriculum planning, team development and cohesion, and additional personnel.

Social Action

1. Continue with current initiatives: Crop Walk, Habit for Humanity, Red Cross Blood Drives, Guest at Your Table, Silent Witness, Centre House, Park Forest Day Nursery, Centre Peace, Interfaith Mission, Freedom Seder/Social Justice Trips and others.
2. Continue First Sunday Plate Collections involving the congregation in selecting charities.
3. Create documentation (hard copy and electronic) for social action events.
4. Partially sponsor a delegate to the Unitarian Universalist Association General Assembly. The responsibility of this delegate will be to report back to the Social Action Committee and the congregation about Actions of Immediate Witness and Statements of Conscience.
 - a. Develop a system to select who is sponsored to GA.
 - b. Educate the congregation about Actions of Immediate Witness and Statements of Conscience. Have the congregation approve or reject Actions of Immediate Witness and Statements of Conscience so delegates to GA can vote as the congregation's preference.
5. Support the fledgling "Go Green" task force in addressing environmental social action issues.
6. Develop more interaction with UUPlan.
7. Develop more connections between the Social Action Committee and YRUU.

Sunday Services

Our overall goal is to structure services that are responsive to the individual and collective needs of the Fellowship and that are consistent with its mission, vision, and covenant. We will develop varied services that reflect and voice the diversity of the congregation.

1. Eleven services during the summer months
2. One service per month otherwise
3. Approximately 22 services during the minister's sabbatical

Music

1. Evaluate yearly procedures for committee operation.
2. Work with in-house consultants to make improvements to the choir performance area in the 1st year.
3. Excluding salaries of the music professional staff, increase the music budget to \$2,500 in the first year and incrementally to approximately 10% of the total UUFCC budget by the 5th year including salaries.
4. Secure space in the expanded building specifically designated for “music”.
5. Increase the Music Director's position to 1/2 time by the 3rd year.
6. Develop fully integrated children’s and youth music programs in conjunction with the RE program to coincide with expansion of the Music Director’s position by the 3rd year.
7. Facilitate the formation of a regularly playing string group by the 4th year.
8. Continue support of the UUFCC Band through equipment and sheet music purchases.

ADMINISTRATIVE PLAN

The administrative plan documents the means by which our Fellowship hopes to carry out the program plan. An overview of the administrative plan is presented here. Additional details are provided in the corresponding appendices.

Personnel

This committee is currently being restructured and did not submit a report to this LRP. However, in the previous LRP, this group recommended hiring a Volunteer Coordinator (i.e. Membership Coordinator). This goal is being carried forward in this LRP.

Building Exterior and Grounds

Items to consider for the next five years:

1. The major long-range concern is somewhat short-range at the present time: the building expansion to the east of the present Social Room. The expansion also means more water run-off and the need to accommodate this run-off to meet code.
2. The Fellowship needs to consider what to do with two memorial trees planted in the vicinity of the building site.
3. There has been talk about building an electric generating windmill on the property.
4. In the future we must judge our parking needs as we grow.
5. Some group or the Board should determine what we should do for the Labyrinth on the other side of the Amphitheatre.
6. In the future, we may want to raise the question of a Memorial Garden once more.
7. We will have to decide where to put the present shed adjacent to the Social Room when the building addition is begun.
8. Re-visit the need for the children's garden, begun three or four years ago near the retention pond.
9. Consider building a stone fireplace in the southeast corner (beyond the Labyrinth) of the property.

Finance

In addition to the details on membership and finance that are provided on the subsequent pages, the Finance Committee identified several relevant financial issues that should be addressed during the next five years.

1. Develop a cash reserve of \$75,000. Two ways that this might be achieved include: 1) a line item in the annual budget that adds incrementally to this reserve, and/or 2) a fundraising event specifically focused on or held in conjunction with the capital campaign for the building expansion.
2. We should be able to assume a mortgage that requires an annual payment between \$24,000 and \$36,000.

3. Adding personnel expenses in the form of a Membership Coordinator or increasing the Music Director's position must be matched by additional income. The most significant way that income increases is through additional members and increases in individual annual financial commitments.
4. If membership continues to grow, additional service space will be required either through an expanded sanctuary or additional Sunday (or weekend) services.

Membership and Financial Summary

The financial summary presented here is based on historical records, including a comparison to the previous long range plan (from 2006-2010), a financial projection developed by the current Finance Committee, and financial projections independently developed by the Long Range Planning Committee (LRP). Two somewhat independent financial projections provide an additional degree of robustness to projections derived from one group or source.

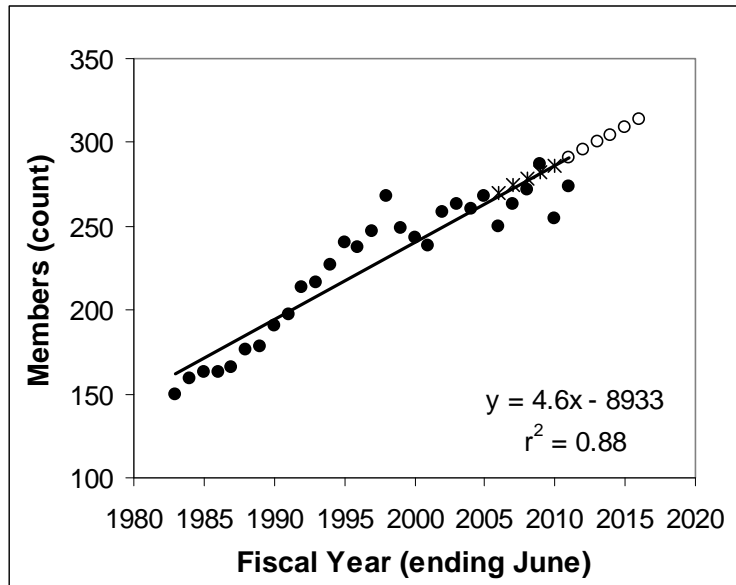
Overall Summary

1. Since 1983, membership at the UUFCC has increased at an annual average rate of 4.6. Financial projections are based on this increase and corresponding increases in financial commitment by our members.
2. Three financial projections based on slightly varied assumptions are presented. By fiscal year 2015-2016, income is projected to increase from \$298,000 to \$339,000-361,000 and expenses from \$298,000 to \$358,000-374,000. All three scenarios are reasonable and appear to be fiscally prudent.
3. These projected scenarios assumed conservatively high estimates of additional building and / or mortgage expenses.
4. We should be able afford a mortgage for the building expansion with an annual payment between \$24,000 and \$36,000.

Membership

Since 1983, membership at the UUFCC has increased at an annual average rate of 4.6 members. Although this is representative of the long term growth experienced at UUFCC, there is considerable year-to-year variability that is reflected in Figure 1.

Figure 1



Closed symbols = actual membership; Open symbols = projection based on trendline; Asterisks = projection from previous long range plan; Solid line = linear fit, 1991-2010;

Current membership is 274, which is 19 more than the 255 recorded in 2010. The sharp drop in 2010 was a result of the Membership Committee’s thorough vetting of current and active members. Based on a comparison to the projections from the previous long range plan (asterisks), the linear trend provides a reasonable projection for UUFCC membership. By 2016, the UUFCC can expect membership to be at or about 314, given the long-term increase in members.

With the completion of the proposed building expansion, we might expect that this membership estimate is conservatively low. The relatively rapid increase in membership growth observed between 1990 and 1998 could be reasonably attributed to the completion of the current building. A faster than usual increase in membership is likely to occur when the proposed building expansion is completed.

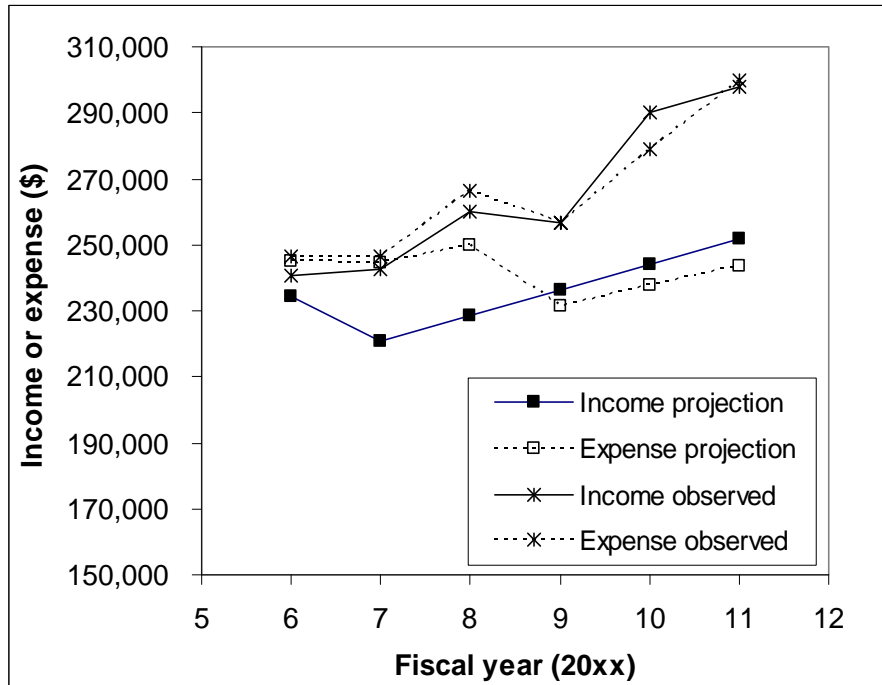
Budget Summary

This budget summary begins with a review of the most recent five years, 2006 through 2011.

With the previous long range plan, expenses were projected to exceed income in 2006, 2007, and 2008. Between 2009 and 2011, UUFCC income was projected to exceed expenses by \$4,000-8,000 (see Figure 2 below). Although observed expenses were similar to projections in 2006 and 2007, expenses increased from \$246,000 in 2006 to almost \$300,000 in 2011, considerably more than expected. Actual income also increased by nearly the same amount, and in 2011 we anticipate a balanced budget (or nearly so), which includes a \$24,000 line item to prepare us for the anticipated mortgage from the building expansion.

Forecasts with the previous long-range plan were conservative and the subsequent budgets between 2006 and 2011 were considerably more favorable than anticipated.

Figure 2



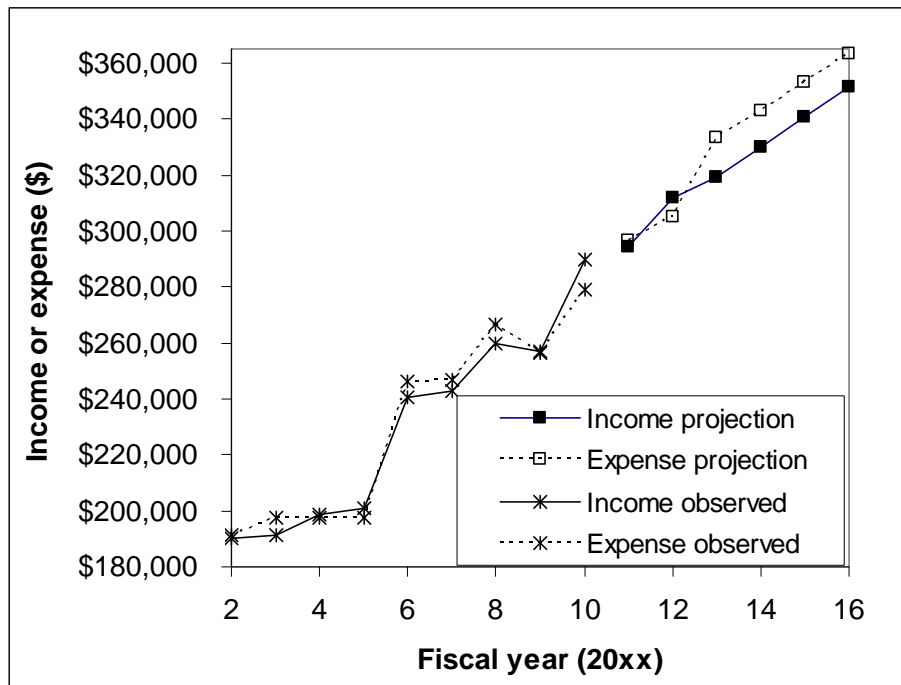
Budget projections are never certain, so we have provided three different scenarios to consider. Two of these budget scenarios were developed by the LRP Committee and one scenario was developed independently by the Finance Committee. Each scenario is presented within the context of specific assumptions, which are provided here, and additional details from which some of these assumptions are based are provided in Appendix G.

Scenario 1: Developed by the Finance Committee

This budget projection indicates a \$2,500 loss for the current year, a \$6,700 income next year, and then \$10,000-14,000 shortfall for each of the subsequent years through 2016. This projection includes a mortgage estimate of \$36,200, which is \$12,000 greater than presented by the capital campaign team. This larger amount may reflect the assumption of additional building expansion costs using a 10% cost overrun (see details in Appendix G), above the cost overrun already provided by the latest architectural plans.

Based on reasonable anticipated income and expenses, and perhaps conservatively high on building expansion costs, the budget projections are certainly not unfavorable and, perhaps, should be considered favorable.

Figure 3



Details of the assumptions for this scenario are provided in Appendix G, but the most relevant ones are provided here.

Assumptions: Scenario 1

1. Membership growth from 274 in 2012 to 314 in 2016
2. Average pledge increase from \$858 in 2012 to \$965 in 2016
3. Rate of pledge increase is a function of members and average pledge
4. 3% increase in non-pledge and other income
5. 3% increase in current expenses, which includes a \$24,000 mortgage
6. \$12,207 in additional mortgage expense (see Appendix G for details)
7. Additional 10% in building expenses

Scenario 2: Developed by the LRP Committee

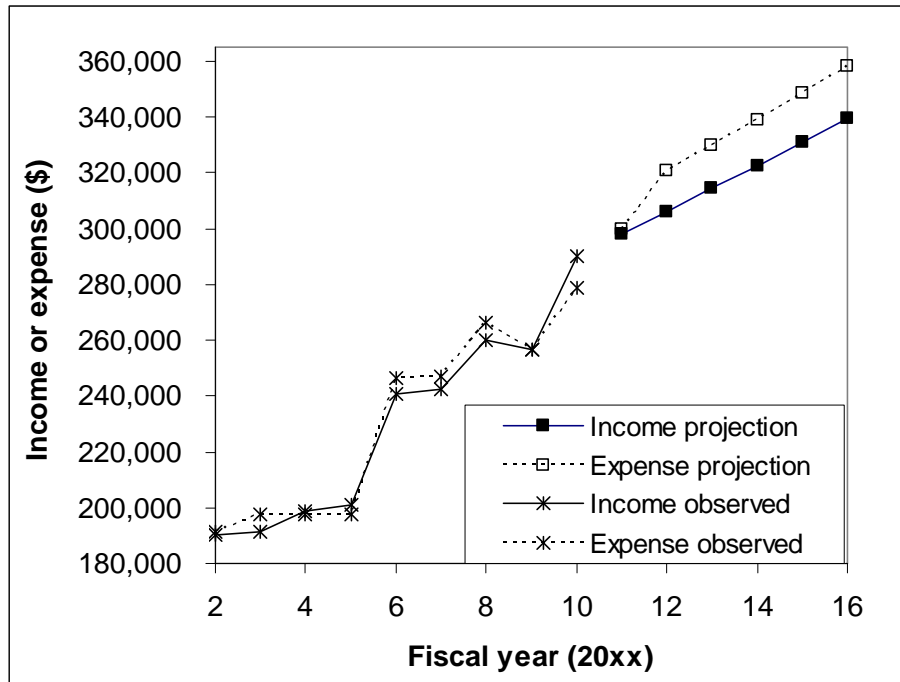
This budget projection indicates a \$1,800 loss for the current year and \$14,000-19,000 shortfall for the subsequent years through 2016. Because this scenario was independently developed compared to the projections provided by the Finance Committee (Scenario 1), we cannot directly compare assumptions with each forecast, but the overall results are similar.

The LRP Committee believes that the forecast for income relative to expenses might be conservatively low. For example, we assumed a 2.65% increase in all income categories, following the recent nine-year trends. If membership increases more quickly as a result of the building expansion (a reasonable expectation), income in all categories will likely increase at a

faster rate than projected. We have also projected a 5% increase in expenses related to programs. This is greater than recent trends, but this might be expected with more space for programs and more people participating in programs. We've also added a \$7,500 annual expense for a building reserve fund (in addition to a mortgage).

This budget scenario, although projecting a deficit budget, probably relies on conservatively low estimates of income and conservatively high estimates of expenses. Similar to Scenario 1, the projections are not entirely unfavorable.

Figure 4



Details of the assumptions for this scenario are provided in Appendix G, but the most relevant ones are provided here. Trends for specific projections are provided in the Appendix G.

Assumptions: Scenario 2

1. Linear increase in plate collection, based on nine-year trends
2. Linear increase in in-hand pledge income, based on nine-year trends
3. 2.65% increase in non-pledge income following pledge forecast
4. Linear increase in special projects income, based on nine-year trends
5. 2.65% increase in additional income following pledge forecast
6. 5% increase in expenses from all committees (most programs)
7. 5% increase in RE and youth expenses
8. 2.65% increase in contributions (JPD, UUA, First Sunday collection) following pledge forecast
9. \$24,000 annual mortgage beginning FY11
10. \$7,500 building maintenance fund beginning FY12

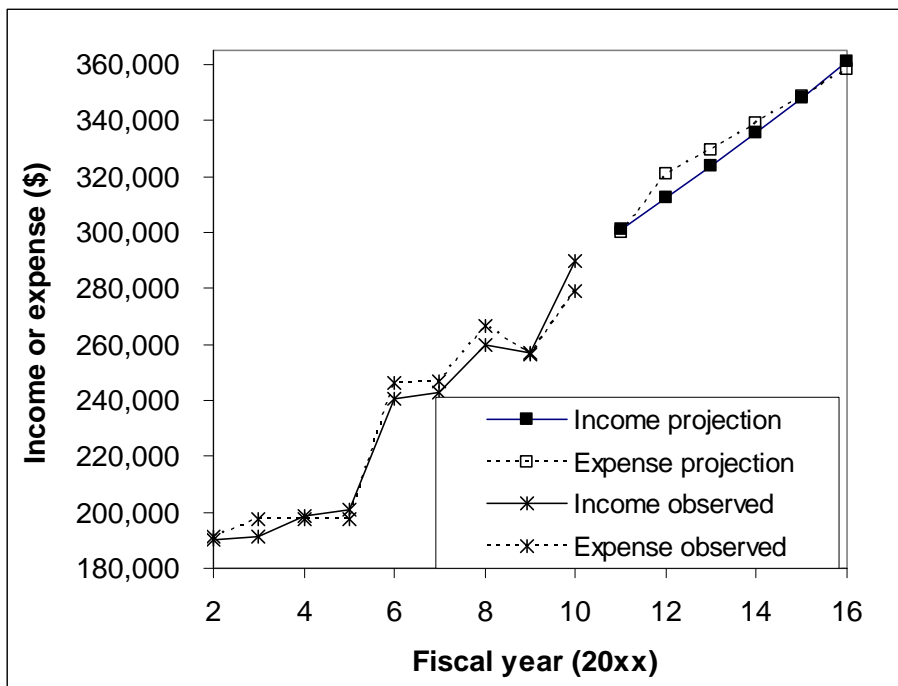
11. Utilities in FY11 = \$9790, FY12=\$14,685 (or 1.5 x FY11), 3% increase subsequent to FY12
12. 3% annual increase for all personnel expenses
13. 3% annual increase for childcare expenses

Scenario 3: Developed by the Long Range Planning Committee

By assuming slightly more aggressive in-hand pledge, non-pledge, and additional income (see assumptions below), the income for the next five years will increase similarly to projected expenses. The additional income considered here is probably realistic if we consider that we will have a greater increase in membership as a result of the building expansion—a common phenomenon (i.e., membership will grow to fill the new space).

Projections for income and expenses are consistent with trends observed during the previous six years (see Figure 5). The projections associated with this scenario appear reasonable and quite favorable.

Figure 5



Assumptions: Scenario 3 (presenting those that are different from the assumptions for Scenario 2)

1. 4% increase in in-hand pledge income (compared to 2.65% for Scenario 2)
2. 3% increase in non-pledge income (compared to 2.65% for Scenario 2)
3. 3% increase in additional income (compared to 2.65% for Scenario 2)

APPENDICES

An Introduction to the Appendices

Appendices A through S contain the Long Range Plans prepared by the committees, activities, Board, and Program Council. Each group was given a template to follow which asked for the following information:

- Identify and list committees within your long range planning group
- Identify current strengths and challenges of this group
- List goals for the next five years
- Provide the objective (rationale or justification) for the goals you identified
- Identify resources required to accomplish these goals and a timeline for implementation

The LRP appendices summarize the goals recommended by each group. These appendices represent the results from these various working groups, so format and content do not always follow a single template.

The Long Range Planning Committee used these documents to guide us in identifying priority goals for the Fellowship as a whole and to craft the overall plan.

These appendices should serve as the starting material for regular updates (at least annually) to the current LRP plan.

Appendix A: Religious Education Plan

Children and Youth Religious Education Committee Five-Year Plan and Passion Statement 2011

This plan was created to help the children and youth in the UUFCC grow up in the Fellowship and experience all aspects of religious and social life. At the Commitment Ceremony for each child, adult members pledge to help raise and nurture their spiritual growth and development. This long-range plan seeks to *significantly improve* the full integration of children and their families in vital, comfortable, and inviting ways.

1. Committees and other groups represented by this Long Range Plan
 - Children and Youth Religious Education Committee
 - Tony Guerrero, Eileen Wise co-chairs 2009-2011
 - Jan Wuest
 - Phill Becker
2. Strengths
 - Growing numbers of families who are looking for a high quality religious education program that reinforces the values they share
 - Director of Lifespan Religious Education (DLRE) who is a well trained professional with 5+ years of experience at the UUFCC
 - Committed group of volunteer teachers, assistants, and committee members with strong backgrounds in education
 - Enhanced opportunities for families to connect socially, such as Wonderful Soulful Wednesday and Family Times, that also promote a shared vision of a beloved community in which all people can feel safe, supported, and empowered
3. Two major goals for the next five years:
 - Improve the integration of the children and youth with the other religious and social activities of the Fellowship through increased communication and renewed commitment to their growth and well-being.
 - Continue to build upon and improve the quality of the religious education program through enhanced curriculum planning, team development and cohesion, and additional personnel.

Goal #1

- Improve the integration of the children and youth with the other religious and social activities of the Fellowship through increased communication and renewed commitment to their growth and well-being.

Action Plan

Create opportunities for open, regular communication between the Children and Youth Religious Education Committee and the Sunday Services Committee.

- Children and Youth (Kindergarten-8th grade) will continue to participate in Sunday services, at least twice a month, as has been happening for the past year
 - REC members will meet with Sunday Services Committee 4 times per year to coordinate RE groups' participation in alternate Sunday services (alternate to Marks', at least one in Fall; one in the Spring). Therefore, the meetings will be a springboard for 2 or more alternate services with children participation, as well as other myriad multi-generational exchanges and experiences.
- a. Develop a database of Fellowship members who have special interests, talents, and expertise and are willing to share with the children and youth of the Fellowship
 - Data will be collected through surveys of Fellowship members requesting the information
 - Members of the Fellowship will be invited in to the RE classrooms to share expertise and special interests and talents, thus permitting more integration and two-way participation.
 - b. Put into place greater regularity and structure to children's participation so that their experience at the Fellowship each week is comfortable and inviting to them. This could include children in the sanctuary for service or a children's service with all children before RE classes.

Rationale

With improved avenues and systems of regular communication and the availability of a database of strengths and talents, members will become more aware of the needs of young children, families, and the RE teachers, and will be eager to expand their two-way communication and participation. As interest and engagement increases, we would expect to see a greater eagerness and an increased number of volunteers to serve as REC members and RE teachers.

Goal #2

- Improve the quality of the religious education program through enhanced curriculum planning, teaching team development and cohesion and additional personnel.

Action Plan

Develop a stable teaching population with passionate, focused recruitment, and training.

- In coordination with the DRE, one or more members of the REC, for now, will serve as Interim Teacher Coordinator/s. He or she will help the DRE with creative recruitment of individuals to be part of the Teaching Teams by Memorial Day, for all age groups, for the following school year. Teaching Teams are needed for the following age groups: K-1st Grade, 2nd – 4th Grade, 5th – 8th Grade, 9th – 12th Grade
- Children and Youth (Kindergarten-8th grade) will continue to participate in Sunday services, at least twice a month, as has been happening for the past year
- Each age group will also have sufficient helpers recruited by the DRE and Teacher Coordinator/s

Clarify teacher's job description and define expected responsibilities.

- Teaching schedules and job definitions
- The DRE and Teacher Coordinator will make sure that each Teaching Team for each age group will develop a teaching schedule (each Team member must teach at least once every three weeks) coordinated within the Teaching Team, including helpers.
- DLRE in conjunction with the REC will provide clearly defined job descriptions for teachers which include responsibilities, advice, pointers, and suggestions

Review the curriculum options and plan a consistent sequence from year-to-year and between the class levels

- The DRE & Teacher Coordinator will do his/ her best to provide teacher support regarding curricula selection and development, lesson plan brainstorming and help, training if he or she is able to provide that, or training by another individual within or outside of the Fellowship, including workshops in or out of town, when needed.
- Assess the current curriculum and library for continuity between classes and age-appropriate themes. Increase the connection between the RE curriculum with sermon topics and include the parents and volunteers who have special interests to assist in beefing up the Sunday morning experience for everyone.
- The object is to create a fun, goal oriented, working curriculum for the RE teachers at each age level with the following three essential foci:
 - i. Promote UU Principles
 - ii. Jive with teachers' particular interests and strengths
 - iii. Be age/content appropriate

Current basic UU Curriculum Themes:

1. Famous UUs
2. World Religions
3. Tapestry of Faith

Already Developed Curricula: It is often very helpful to have a set, already developed, printed, week by week curriculum in a binder. However, that, in conjunction with or alternating with teachers' own, individual lessons, can and should work out also, as long as there is coordination within each Teaching Team towards a cohesive whole.

Developing Your Own Curriculum: However, if the Teaching Team wishes to develop their own curriculum, its members must provide a basic, month by month, Fall- Spring thematic game plan with proposed activities and projects before Fall RE classes begin.

Coordination of RE Curricula and Fellowship Themes and Events: DRE and Teacher Coordinator will creatively pave the way to include children and youth in important themes and events at the fellowship in conjunction with the Minister, the Sunday Services Committee, and other committees involved in those events. Examples: Christmas, Seder, Charitable fund raisers, etc. These might take place in the sanctuary, at a communal meal, in the RE classrooms, or a combination thereof.

Regularly share RE happenings with the parents and the congregation

- Create a system of regular weekly communication between K-8th grade teaching teams and all parents in RE

- Create an email list of all parents of RE students and an email list of all teachers in RE for ease of communication between groups.
- Request space in the Sunday “Order of Service” for RE Happenings of Note so that all members of the Fellowship are aware of important elements of the RE program.

Inviting Specialists to Classes

- A cross-referenced list will be compiled with names of individuals within the Fellowship who have particular areas of expertise. In that way, they can be invited as guests to enrich the classes and the fabric of the Fellowship community.

Rationale

With a stable curriculum and a stable and consistent teaching population, the quality of the RE program will improve. Many opportunities to enhance our programs will be aided by resources and people with special interests and talents within the Fellowship. Teachers will benefit from additional training, guidance, and support. Parent interest will be improved by enhanced communication by teaching teams.

4. Resources Needed

- Part-Time paid Teacher Coordinator
- Consider Penn State Intern as a regular unpaid staff member to assist DLRE and Teacher Coordinator
- Larger-sized classrooms
- Increased storage space
- Teacher preparation room/resources

Some Suggested Duties of Teacher Coordinator

- Help select curricula
- Identify training needs of teachers
- Help plan and direct trainings as needed
- Help recruit teachers and put together teaching teams
- Help coordinate regular communication between classrooms
- Help with parent communication
- Draw in members of Fellowship with special interests and talents
- Provide moral and intellectual support for teachers

Appendix B: Library

UU Library

Current strengths and challenges

The library collections (RE and UU) are rich with resources. However, they are underused. Some of the challenges are 1) the limited, inconvenient and uninviting space, 2) the complexity of organization (RE library), 3) a lack of information about what is needed and desired, and 4) a disconnection between the library and possible readers (no promotion). Opportunities exist to coordinate efforts and collections with the bookstore, and to use the newsletter to promote the collections.

Goals

1. Regularly promote particular subjects and titles with displays and annotated booklists in the newsletter 2011-2016
2. Revise the subject organization of the RE library to make it easier to keep in order and to find things 2011
3. Weed the RE library of unused and unwanted materials 2011
4. Plan for a better space and combine to the extent possible the RE and the UU libraries once the expansion is completed 2011-2013
5. Share holdings information and promotion ideas with the bookstore 2011-2016
6. Keep more complete records about what is being checked out to help with purchasing and weeding decisions 2011-2016
7. Double the annual library circulation (number of items checked out) 2016
8. Make the library a vital part of the UU operation, not just a “nice to have” 2016

Strong library collections support all the other activities of the UU – the Sunday services, religious education, membership recruitment and individual member growth and development. In a University town the UU library has an even greater importance. Members and attendees value books and the information and ideas contained in them.

The library collections should be kept up to date to the extent possible, which requires annual funding. However, most of the resources needed to achieve and sustain these goals are manpower.

The UU expansion project will limit temporarily what the library can do, but should result in a much more attractive and useable space. That by itself will help to draw attention to the collection and increase its use.

The five members of the library committee will either need to spend more time on the library or recruit more members to assist with achieving these goals.

Betsy Allen - Chair, Betsy Berry, Elaine Lau, AraBelle Carlson, Carol Pollard

Appendix C: Social Action

Date: February 2011

Planning Time line: 2011-2016

Committees in this planning cluster	Current Contact
Social Action	Peg Dobrinska
Go Green	Jay Searles
Book for Every Child	Dagmar Wilson Jennifer Loveland-Curtze
Freedom Seder/Social Justice Trips	Laura Brown Mary Erickson
Centre House	Darlene Weener
Guest at Your Table	Janet Irons

Goals and Objectives for the Next Five Years

1. Continue with current initiatives: Crop Walk, Habit for Humanity, Red Cross Blood Drives, Guest at Your Table, Silent Witness, Centre House, Park Forest Day Nursery, Centre Peace, Interfaith Mission, Freedom Seder/Social Justice Trips and others.
2. Continue First Sunday Plate Collections involving the congregation in selecting charities.
3. Create documentation (hard copy and electronic) for social action events.
4. Partially sponsor a delegate to the Unitarian Universalist Association General Assembly. The responsibility of this delegate will be to report back to the Social Action Committee and the congregation about Actions of Immediate Witness and Statements of Conscience.
 - a. Develop a system to select who is sponsored to GA.
 - b. Educate the congregation about Actions of Immediate Witness and Statements of Conscience. Have the congregation approve or reject Actions of Immediate Witness and Statements of Conscience so delegates to GA can vote as the congregation's preference.
5. Support the fledgling "Go Green" task force in addressing environmental social action issues.
6. Develop more interaction with UUPlan.
7. Develop more connections between the Social Action Committee and YRUU.

Strengths

- We have passionate people knowledgeable in many aspects of social action.
- We have recurring all-fellowship social action events. (Book for Every Child, Freedom Seder, Guest at Your Table.)

- We have new members with untapped potential.
- We mobilize for special events (Silent Witness, Letter Writing Campaigns, Disaster Relief.)
- We have many members who have connections to community organizations.
- We have excellent representation at UUA General Assembly.

Challenges and Opportunities

- There is an opportunity to build fellowship through social action.
- We can be creative in finding ways to support our social action financially.
- We have good resources available in the fellowship - library, JPD, and the UUA.
- We need to improve communication with the congregation about Social Action activities.
- People are emotionally attached to and “own” the projects/social actions they support.
- We need leadership development in all areas.

Appendix D: Music Plan

Date: April 2011

Planning Timeline: 2011- 2016

Goals

1. Evaluate procedures for operation of the committee yearly.
2. Work with in house consultants to make improvements to the choir performance area in the 1st year.
3. Excluding salaries of the music professional staff, increase the music budget to \$2,500 in the first year and incrementally to approximately 10% of the total UUFCC budget by the 5th year including salaries.
4. Secure space in the expanded building specifically designated for “music”.
5. Increase the Music Director's position to 1/2 time by the 3th year.
6. Develop fully integrated children’s and youth music programs in conjunction with the RE program to coincide with expansion of the Music Director’s position by the 3rd year.
7. Facilitate the formation of a regularly playing string group by the 4th year.
8. Continue support of the UUFCC Band through equipment and sheet music purchases.

Objectives

1. The ground rules for committee functioning should be evaluated each year and reinforced, perhaps through a mission and covenant statement and through a committee job description.
2. Adequate choir risers and an acoustic support structure are needed for the safety, comfort, and improved sound and presentation quality of our growing choir.
3. Adequate funding will be required to provide an expanded, exciting, and high quality music program for UUFCC.
4. With the building expansion, it will be necessary to have more space for our growing music program and to meet the expressed wishes of our Fellowship community.
5. To provide the desired music program the Music Director will be required to work more hours. The Board of trustees has stated its support for increasing the Music Director’s position from ¼ time to ½ time. Now, we must work to see that this change is made “official” and funded.
6. The UUFCC currently offers very limited music programming in association with its religious education program. This represents a decline from several years ago and is due to inadequate funding of the Music Director’s position. Having a fully developed music program for children and youth has been identified as very important to members and friends of the Fellowship in our recent survey about the music program.
7. We want to provide diversified instrumental music opportunities for UUFCC members/friends.
8. The UUFCC Band is developing well and has become more musically mature. As this ensemble continues on its path, we remain committed to providing it with support appropriate to its changing needs.

Resources

The music program depends on the volunteer time and efforts of numerous UUFCC members/friends (singers, pianists and other instrumentalists) and the paid Music Director and Choir Accompanist. For the past 13 years we have organized the Winterfest Concert Series with the goal that our earnings from these concerts would cover expenses of the music program that our allocated budget did not cover. Our major expenses are purchasing music for the Choir, the UUFCC Band, and any future musical ensembles and tuning and maintaining our pianos. Additionally, we have contributed large portions of our retained earnings from our fundraising activities to other “music related” needs. These have included major refurbishment of the Fellowship’s Baldwin grand piano, purchase of a drum set and cymbals for use by the UUFCC band, purchase of many copies of the new hymnal supplement, paying for the rebinding of many of the Fellowship’s regular hymnals, purchase of a new piano bench, paying for stage one improvements to the choir performance area, and many other smaller incidental items. In recent years, the Music Committee’s budget has been \$1,600. As of the 2011-2012 fiscal year, we have been told our allocated budget will be \$2,500. However, there will also be a change to the financial accounts structure that makes it so we no longer will retain funds earned through our fund raising activities—mainly the Winterfest Concert Series. We support this change in the Music Committee’s accounts as it is more democratic and transparent. However, we are concerned that, as our needs necessarily increase in the coming years, we will no longer be able to adequately support the costs of running the music program at the Fellowship. It is our very sincere hope that thoughtful consideration be given to the real costs and needs of the Music Program as we work toward developing the program appropriate to the new building space and our growing Fellowship community. Failure to do this will have serious negative consequences on the ability of the Music Program to address the needs of our friends and members as we work toward achieving our long term goals.

We also are concerned that we will not have adequate space for our developing music program. In particular, we are concerned about the space allocation of the proposed building expansion plans. There has been no space specifically allocated for music in the plans. We have requested that this be addressed on several occasions and been told that there would be more space for music. But, we have not yet seen evidence of this. The Music Program is a significant part of Fellowship life and we feel this should be reflected in the building expansion plans. We will again request that specific consideration be given to the needs of our Music Program when allocating space in the proposed expanded building.

Timeline

It is our intention that the Music Director’s position will be expanded to ½ time by year three of this planning period (2014-2015 fiscal year). The Music Committee has conducted a detailed survey of the Fellowship’s wishes and expectations relating to the music program (conducted in 2010). The results of this survey are providing our guidance in developing future music programming. High among the wishes of the Fellowship is development of a children’s music program. Although some initial and commendable efforts toward this are being made by volunteers, to develop a truly integrated music program for kids at the Fellowship will require a ½ time Music Director. We believe this more integrated children’s music program can be implemented in the same year the Music Director’s position is increased to ½ time—assuming

this change also includes appropriate increases in funding to support this programming change. Additionally, strong interest has been expressed in having a more diverse music program. We are currently addressing this by adjusting the music presented by the Choir. But, we will continue to support the UUFCC Band and will work toward creation of a small string group, as well. Support of the UUFCC Band will include the purchase of a PA system to allow the band to perform with a vocalist. This purchase will be made in the first year of this planning period using funds retained from our Winterfest Concert Series. With a ½ time Music Director, we can take a larger role in the development of more diverse musical opportunities for our members and friends.

Submitted by Fred Volz, chair, for the Music Committee
Committee members are: Mary Alice Graetzer, Joe Kulik, Cathy Vandenberg, Art Curtze, Lyn Pipenberg, Toby Carlson, Juliane Schicker, Ruth Miller, and Matthew Sheppard—ex officio.

Appendix E: Sunday Services Committee

The Sunday Service Committee plans to continue developing and coordinating lay-led Sunday services, working closely with the minister, religious education (including the Director of Lifespan Religious Education, teachers and students), the music director, the media specialist, and the hospitality coordinator.

Goals

Our overall goal is to structure services that are responsive to the individual and collective needs of the Fellowship and that are consistent with its mission, vision, and covenant.

We will judge our success, and the need for any substantial changes, from feedback submitted by individuals and the Board of Trustees.

Objectives

We will:

- Develop varied services that reflect and voice the diversity of the congregation.
 - 11 services during the summer months
 - 1 service per month otherwise
 - during the minister's sabbatical, approximately 22 services
- Respond to directions and suggestions of the Board of Trustees.
- Work with the Religious Education Committee to include more children in the services both as audience and participants
- Encourage and support non-committee members' participation in and leadership of services
- Take advantage of talent and content debuted at Soulful Sundown services

Strengths

- A dedicated, well-organized, innovative group of committee and fellowship members

Challenges and Opportunities

- Covering the minister's 5-month sabbatical from November 2011 through March 2012.
- Recruiting new committee members as well as an "auxiliary" core of service providers and participants who do not necessarily need to belong to the committee.
- Including more fellowship members in the services (for example as chalice lighters or readers)
- Addressing the diverse, sometimes conflicting, desires of the Fellowship

Resources

- A budget line to cover honoraria and travel expenses for visiting speakers

Timeline/Plan

- Services will be planned well in advance

Recorder of this document: Laura Kemper

Program Council Liaison: Toby Short

UUFCC President: Helen Dempsey

Date 3/1/11

Date 3/1/11

Date 3/1/11

Appendix F: Soulful Sundown Services

Chair: Lois Durran

Strengths and Opportunities:

Soulful Sundown is an evening extension of our Sunday morning services, and is offered twice a month, on the first and third Sundays. It is a quiet, contemplative service with an over-all spiritual feeling. Soulful Sundown services attempt to nurture and challenge, and to provide a deep spiritual experience fostering both intimacy and ultimacy.

Soulful Sundown services are lay-led. Anyone can suggest a service topic, and we have a regular group of people who share the responsibility of leading services.

At this time, Soulful Sundown takes place on the first and third Sunday of each month, from October to June. There are no plans to change this.

Goals and Objectives:

We plan to continue to provide a variety of services that will appeal to the Fellowship's diverse population.

Resources:

Currently Soulful Sundown costs almost nothing. There is an occasional fee or honorarium, but mostly these services are led by our Fellowship members. We use the Sanctuary, and the heat and lights.

Submitted:

3/22/11

Lois Durran

Appendix G: Finance Report Assumptions

Scenario 1: Developed by the Finance Committee

**Unitarian Universalist Fellowship of Centre County
Long Range Plan 2010 -2020
April 16, 2011**

	<u>Actual</u> for <u>FY 2009-10</u>	<u>March YTD</u> <u>Estimate</u> for <u>FY 2010-11</u>	<u>Third Draft</u> <u>of Proposed</u> <u>Budget for</u> <u>FY 2011-12</u>	<u>Forecast</u> <u>FY 2012-13</u>	<u>Forecast</u> <u>FY 2013-14</u>	<u>Forecast</u> <u>FY 2014-15</u>	<u>Forecast</u> <u>FY 2015-16</u>	<u>Forecast</u> <u>FY 2016-17</u>	<u>Forecast</u> <u>FY 2017-18</u>
Pledge Receipts	\$ 204,905	\$ 213,865	\$ 235,000	\$ 239,762	\$ 248,204	\$ 256,647	\$ 265,089	\$ 273,531	\$ 281,974
Non-Pledge Receipts	33,155	31,984	27,000	27,810	28,644	29,504	30,389	31,300	32,239
Other Income	51,862	48,209	49,915	51,412	52,955	54,543	56,180	57,865	59,601
Income	\$ 289,922	\$ 294,058	\$ 311,915	\$ 318,984	\$ 329,803	\$ 340,694	\$ 351,658	\$ 362,697	\$ 373,814
Expenses									
Committees & Programs	6,662	9,462	11,850	12,206	12,572	12,949	13,337	13,737	14,150
RE and Youth Programs	1,617	1,806	2,400	2,472	2,546	2,623	2,701	2,782	2,866
Contributions	37,066	35,010	37,153	38,268	39,416	40,598	41,816	43,071	44,363
Facilities/Utilities/Office	49,648	64,802	65,439	67,402	69,424	71,507	73,652	75,862	78,138
Personnel	183,976	185,547	188,405	194,057	199,879	205,875	212,051	218,413	224,965
Subtotal	278,969	296,627	305,247	314,404	323,837	333,552	343,558	353,865	364,481
Additional Mortgage Expense*				12,207	12,207	12,207	12,207	12,207	12,207
Exps for Bldg Expansion				6,740	6,942	7,151	7,365	7,586	7,814
Volunteer Coordinator									
Incr Music Director's hours									
Total	\$ 278,969	\$ 296,627	\$ 305,247	\$ 333,351	\$ 342,985	\$ 352,909	\$ 363,130	\$ 373,658	\$ 384,501
Net Income/(Loss)	10,953	(2,569)	6,668	(14,367)	(13,182)	(12,215)	(11,472)	(10,961)	(10,687)
Membership	245	255	274	284	294	304	314	324	334
Average Pledge	\$836	\$839	\$858	\$883	\$910	\$937	\$965	\$994	\$1,024

Assumptions

Pledge/member (Average 3 yrs)	\$844				
No of new members/year (net)	12				
Rate of Increase	3%				
Expenses for Building Expansion	10%	of Facilities/Utilities/Office			
Annual Incr in new members (net)	10				

*Additional Mortgage Expense: additional to the \$24,000 included in Facilities/Utilities/Office above

Building Expansion Assumptions

Cost	\$1,200,000
Cost over-run - 10%	\$120,000
Final Cost	\$1,320,000

Amount Needed for Mortgage

Balance Sheet Capital Improvement a/c #2010	\$	9,183	
Building Pledges to Date (on UUFCC bal sheet)	\$	55,318	Paid
Building Pledges to Date (with Endowment Bd)	\$	170,389	Paid
Cash on Hand	\$	234,890	
Total Pledges for Building	\$	806,000	
Paid	\$	(225,707)	
Outstanding Building Pledges	\$	580,293	
Shrinkage @ 5%	\$	(29,015)	
Outstanding Pledge Commitments	\$	551,278	

Calculation of Mortgage

Mortgage	\$0
Interest Rate	5.5%
Months	360
Years	30
Monthly Payment	\$3,017
Mortgage Annual Amount	\$36,207
Amt Included in Exps Above	(24,000)
Additional Mortgage Annual Exp	\$12,207

Cost of the Building	\$	1,320,000
Cash on Hand	\$	(234,890)
Outstanding Pledge Commitments	\$	(551,278)
Mortgage	\$	<u>533,832</u>

1. How much cash reserve should UUFCC maintain?

<u>Months</u>	<u>Monthly Expenses</u>	<u>Reserve</u>	
3	24,468	73,404	A 3-month reserve for expenses is adequate.
6	24,468	146,807	
9	24,468	220,211	
12	24,468	293,614	

2. What amount of endowment should we be working towards?

Value of Endowment Funds as of April 3, 2011

Endowment Funds	\$	128,120
Memorial Accumulation Fund	\$	6,295

Total

Desired Amount

Because the purpose of the Endowment Fund is so narrowly defined, the amount is not relevant to the normal operations of the fellowship. The current value is adequate to assist in the only emergency that the Endowment Fund is authorized for: to preserve the fellowship from disbanding due to financial hardship. The more relevant account is the Memorial Accumulation Fund which was created to assist the congregation in case of unforeseen financial needs. It is funded by contributions from memorials.

Scenario 2: Developed by the LRP Committee

Fiscal year	< Historical financial statements								
	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
INCOME									
4200 · Plate Collections	4,907	5,184	5,009	5,229	6,091	8,630	6,759	6,670	6,887
4300 · Pledge Receipts (in-hand)	160,133	157,717	165,804	171,251	179,274	185,987	196,240	189,550	204,905
4400 · Non-Pledge Receipts	5,699	5,444	6,497	3,275	4,761	5,699	2,652	20,803	33,155
4800 · Special Projects	12,329	13,162	13,228	12,876	12,855	8,307	15,276	15,023	14,692
4900 · Additional Income	7,162	10,035	8,386	8,212	16,539	22,926	18,826	24,797	30,283
4910 · Bequest					21,000	11,149	20,169		
Total 4000 · INCOME	190,230	191,542	198,923	200,843	240,520	242,698	259,922	256,843	289,922
EXPENSE									
5100 · Committees	8,507	6,570	7,208	5,026	10,757	8,761	8,634	6,961	6,662
5200 · RE & Youth	2,660	1,794	3,148	6,712	4,401	3,884	2,011	1,639	1,617
5300 · Contributions	10,860	10,800	13,018	17,940	19,128	18,750	20,714	33,224	37,066
5400 · Facilities (includes mortgage)	39,790	38,152	42,660	45,141	43,271	47,673	51,231	28,415	37,893
5500 · Office	10,781	10,706	10,718	12,838	11,783	10,784	9,951	9,791	11,755
5600 · Other						1,426	1,346	98	
Total 5000 · (other expense)	72,598	68,021	76,753	87,657	89,341	91,278	93,887	80,128	94,992
Personnel									
6010 · Custodian	4,737	5,710	5,881	6,062	6,194	283	-	195	
6020 · Director of RE	25,357	29,941	10,478	-	43,549	48,516	53,448	54,857	58,165
6030 · Financial Secretary	1,955	2,691	2,772	2,859	2,980	2,929	3,356	3,518	3,518
6200 · Minister	62,682	66,395	68,049	69,718	70,887	74,526	79,310	80,627	82,311
6400 · Music Director	4,306	7,097	7,313	8,593	10,897	6,870	10,412	10,843	11,495
6420 · Office Administrator	17,327	15,620	18,696	19,213	20,247	19,800	19,790	20,740	22,335
6900 · Other Personnel Expense	-	-	965	1,256	345	1,387	4,102	3,563	3,861
7000 · Childcare	2,174	2,049	2,100	2,080	1,825	1,130	2,160	1,963	2,291
Total 6000+7000 · Personnel	118,539	129,502	120,716	109,781	156,925	155,441	172,578	176,306	183,976
Total 5000+6000+7000 · EXPENSE	191,137	197,523	197,469	197,438	246,266	246,719	266,465	256,434	278,969
Net Income	(907)	(5,981)	1,454	3,405	(5,745)	(4,020)	(6,543)	408	10,953

Fiscal year	Projections >					
	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
INCOME						
4200 · Plate Collections	7,278	7,558	7,838	8,118	8,398	8,678
4300 · Pledge Receipts (in-hand)	210,168	216,004	221,841	227,677	233,514	239,351
4400 · Non-Pledge Receipts	34,029	34,925	35,845	36,790	37,759	38,754
4800 · Special Projects	15,416	15,754	16,093	16,431	16,770	17,109
4900 · Additional Income	31,081	31,900	32,740	33,603	34,488	35,397
4910 · Bequest						
Total 4000 · INCOME	297,970	306,141	314,357	322,619	330,929	339,288
EXPENSE						
5100 · Committees	8,355	8,773	9,211	9,672	10,156	10,663
5200 · RE & Youth	3,096	3,251	3,413	3,584	3,763	3,951
5300 · Contributions	35,010	36,060	37,142	38,256	39,404	40,586
5400 · Facilities (includes mortgage)	55,480	68,819	69,939	71,092	72,280	73,503
5500 · Office	12,108	12,471	12,845	13,230	13,627	14,036
5600 · Other						
Total 5000 · (other expense)	114,049	129,374	132,551	135,835	139,230	142,740
Personnel						
6010 · Custodian	-					
6020 · Director of RE	59,831	61,626	63,475	65,379	67,340	69,361
6030 · Financial Secretary	3,392	3,494	3,599	3,707	3,818	3,932
6200 · Minister	82,716	85,197	87,753	90,386	93,098	95,891
6400 · Music Director	11,536	11,882	12,239	12,606	12,984	13,373
6420 · Office Administrator	21,814	22,468	23,142	23,837	24,552	25,288
6900 · Other Personnel Expense	3,977	4,096	4,219	4,346	4,476	4,610
7000 · Childcare	2,500	2,575	2,652	2,732	2,814	2,898
Total 6000+7000 · Personnel	185,766	191,339	197,079	202,991	209,081	215,354
Total 5000+6000+7000 · EXPENSE	299,814	320,713	329,630	338,826	348,311	358,094
Net Income	(1,844)	(14,572)	(15,273)	(16,207)	(17,382)	(18,806)

INCOME

4200 · Plate Collections	linear increase based on trends from last nine years
4300 · Pledge Receipts (in-hand)	linear increase based on trends from last nine years
4400 · Non-Pledge Receipts	2.65% increase following pledge forecast
4800 · Special Projects	linear increase based on trends from last nine years
4900 · Additional Income	2.65% increase following pledge forecast
4910 · Bequest	

Total 4000 · INCOME**EXPENSE**

5100 · Committees	5% increase, anticipated increase in programs
5200 · RE & Youth	5% increase, anticipated increase in RE and youth
5300 · Contributions	2.65% increase (based on pledge forecast)
5400 · Facilities (includes mortgage)	Assumes \$24,000 annual "mortgage" beginning FY11
5500 · Office	Assumes 3% annual increase after FY10
5600 · Other	\$7500 annual building maintenance fund, beginning FY12 Utilities in FY11 = \$9790, FY12=\$14685 (or 1.5x FY11)
Total 5000 · (other expense)	3% annual increase in utilities after FY11

Personnel

6010 · Custodian	
6020 · Director of RE	Assumes 3% annual increase after FY10
6030 · Financial Secretary	Assumes 3% annual increase after FY10
6200 · Minister	Assumes 3% annual increase after FY10
6400 · Music Director	Assumes 3% annual increase after FY10
6420 · Office Administrator	Assumes 3% annual increase after FY10
6900 · Other Personnel Expense	Assumes 3% annual increase after FY10
7000 · Childcare	Assumes 3% annual increase after FY10

Total 6000+7000 · Personnel**Total 5000+6000+7000 · EXPENSE**

Net Income

Scenario 3: Developed by the long range planning committee

Fiscal year	Projections >					
	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
INCOME						
4200 · Plate Collections	7,278	7,558	7,838	8,118	8,398	8,678
4300 · Pledge Receipts (in-hand)	213,101	221,625	230,490	239,710	249,298	259,270
4400 · Non-Pledge Receipts	34,150	35,174	36,229	37,316	38,436	39,589
4800 · Special Projects	15,416	15,754	16,093	16,431	16,770	17,109
4900 · Additional Income	31,191	32,127	33,091	34,084	35,106	36,159
4910 · Bequest						
Total 4000 · INCOME	301,136	312,239	323,741	335,659	348,008	360,805
EXPENSE						
5100 · Committees	6,862	7,068	7,280	7,498	7,723	7,955
5200 · RE & Youth	1,665	1,715	1,767	1,820	1,874	1,930
5300 · Contributions	35,010	36,060	37,142	38,256	39,404	40,586
5400 · Facilities (includes mortgage) ^a	55,480	68,819	69,939	71,092	72,280	73,503
5500 · Office	12,108	12,471	12,845	13,230	13,627	14,036
Total 5000 · (other expense)	111,125	126,134	128,973	131,897	134,909	138,011
Personnel						
6020 · Director of RE	59,831	61,626	63,475	65,379	67,340	69,361
6030 · Financial Secretary	3,392	3,494	3,599	3,707	3,818	3,932
6200 · Minister	82,716	85,197	87,753	90,386	93,098	95,891
6400 · Music Director	11,536	11,882	12,239	12,606	12,984	13,373
6420 · Office Administrator	21,814	22,468	23,142	23,837	24,552	25,288
6900 · Other Personnel Expense	3,977	4,096	4,219	4,346	4,476	4,610
7000 · Childcare	2,500	2,575	2,652	2,732	2,814	2,898
Total 6000+7000 · Personnel	185,766	191,339	197,079	202,991	209,081	215,354
Total 5000+6000+7000 · EXPENSE	296,891	317,472	326,052	334,888	343,990	353,364
Net Income	4,245	(5,234)	(2,310)	771	4,019	7,441

Fiscal year

INCOME

4200 · Plate Collections	linear increase based on trends from last ten years
4300 · Pledge Receipts (in-hand)	Assumes 4% annual increase after FY10
4400 · Non-Pledge Receipts	Assumes 3% annual increase after FY10
4800 · Special Projects	linear increase based on trends from last ten years
4900 · Additional Income	Assumes 3% annual increase after FY10
4910 · Bequest	

Total 4000 · INCOME

EXPENSE

5100 · Committees	5% increase, anticipated increase in programs	
5200 · RE & Youth	5% increase, anticipated increase in RE and youth	
5300 · Contributions	2.65% increase (based on pledge forecast)	
5400 · Facilities (includes mortgage) ^a	Assumes \$24,000 annual "mortgage" beginning FY11	\$7500 annual building maintenance fund, beginning FY12
5500 · Office	Assumes 3% annual increase after FY10	Utilities in FY11 = \$9790, FY12=\$14685 (or 1.5x FY11)

Total 5000 · (other expense)

Personnel

6020 · Director of RE	Assumes 3% annual increase after FY10
6030 · Financial Secretary	Assumes 3% annual increase after FY10
6200 · Minister	Assumes 3% annual increase after FY10
6400 · Music Director	Assumes 3% annual increase after FY10
6420 · Office Administrator	Assumes 3% annual increase after FY10
6900 · Other Personnel Expense	Assumes 3% annual increase after FY10
7000 · Childcare	Assumes 3% annual increase after FY10

Total 6000+7000 · Personnel

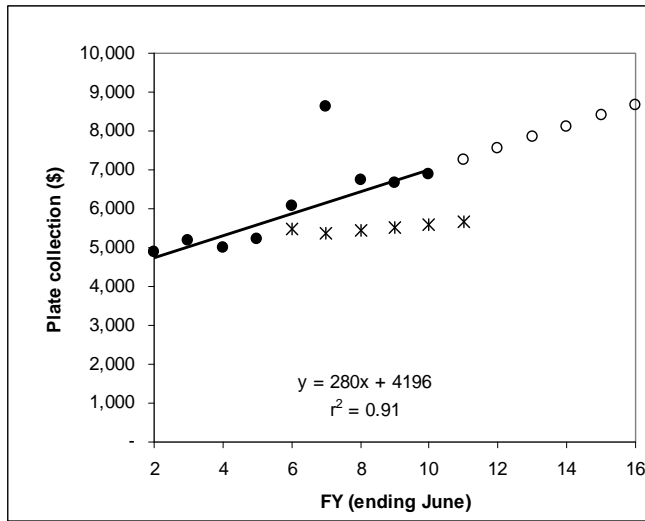
Total 5000+6000+7000 · EXPENSE

Net Income

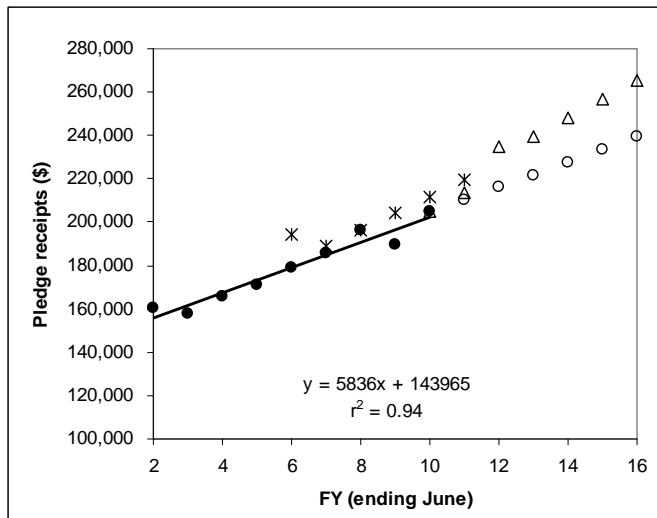
The subsequent graphs illustrate the nine-year trends that were used in the assumptions for budget Scenario 2 (and 3 with exceptions noted). Note changes in the vertical axis scale; i.e., the difference in amount between graphs is sometimes quite large.

- Legend:
- Solid circles = actual observations
 - Solid line = linear trendline for observations
 - Open circles = projections based on trendline
 - Asterisks = projections from previous long range plan
 - Triangles (where present) = projections based on Finance Committee's Scenario 1

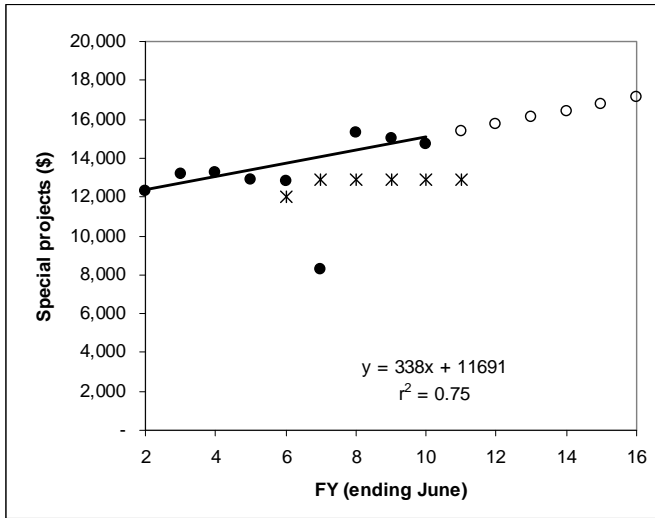
Plate Collection



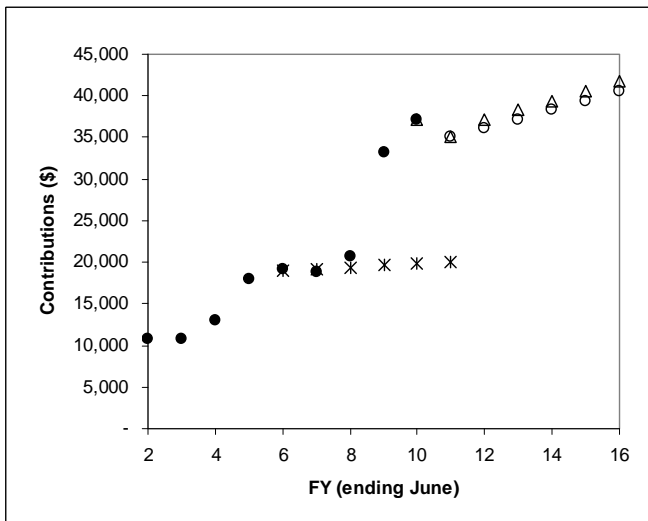
In-hand Pledge Income



Special Projects Income

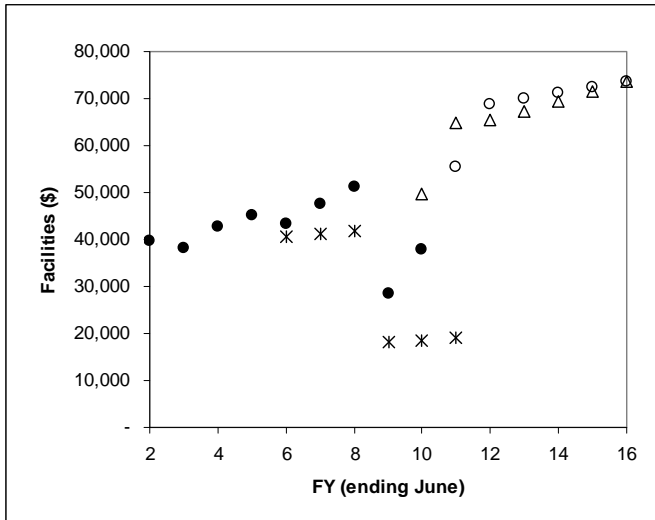


Contributions (JPD, UUA, First Sunday Collection) Expenses

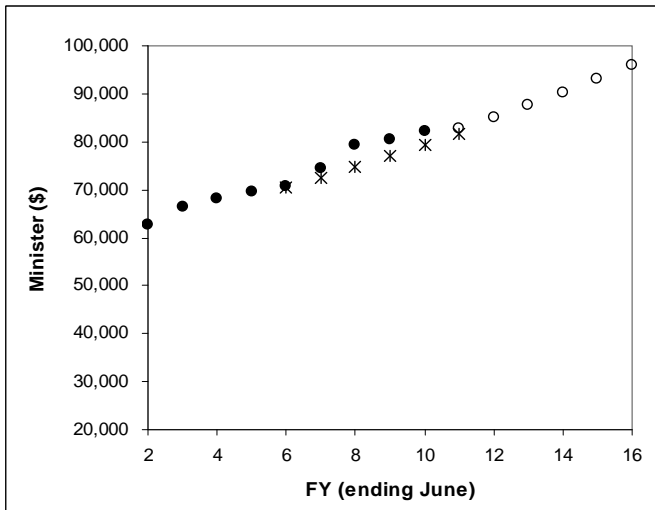


|

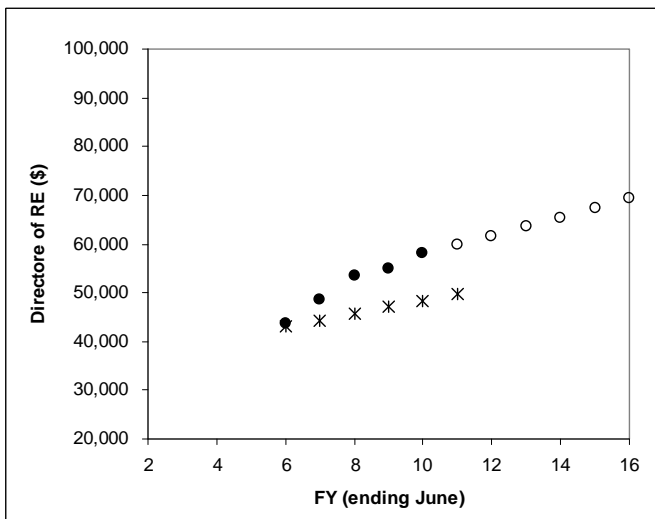
Facilities Expenses (the Finance Committee's estimate includes office expenses)



Minister Expenses



Director of RE Expenses



Appendix H: Stewardship

Long Range Plan - Stewardship

Chair: Lois Durran

This committee organizes the Annual Budget Drive that raises the monies for the Annual Budget, supporting the UUFCC in its Mission and Vision.

Committee responsibilities include:

- Publish and distribute brochure
- Organize All-Fellowship event
- Recruit, organize and train Visiting Stewards

Goals for the next five years:

Our one goal is to raise sufficient funds to accommodate the Fellowship's growth. It seems that our Budget Drives are more successful when we use Visiting Stewards. The next five years will see increased expenses because of our expanded building, and it will be necessary to continue to increase our donations. To that end, more Stewards will need to be recruited, and this recruitment will be a year-round focus.

Submitted:

3/22/11

Lois Durran

Appendix I: Membership Committee

Membership Chair: Betsy Berry

Strengths

- UUFCC already has a large number of activities and programs that provide a way for outgoing members and newcomers to get involved.
- We have a clear path to membership.
- We have been doing a good job of attracting visitors (over 100 per year) already with:
 - Good website
 - Sign by the street
 - Winterfest series
 - Rentals to OLLI, concerts, Etc., are a chance for the community to find out about us
 - Lots of programs that members can bring friends to (games, BAA, movies)
 - Excellent newsletter and eNews for disseminating information
 - Wayside pulpit sign
 - More local Social Justice projects
 - CDT coverage of First Sunday plate collection
- We believe that we are doing a good job of greeting visitors:
 - Trained Sunday greeters, usually at least two or three are on duty
 - Hospitality Teams are an easy way to get involved

Challenges and Opportunities

- We could benefit from use of a Member/Friend database of gifts and talents.
- In house brochures outdated, need a clearer statement of our purpose in lobby
- Biggest challenge is finding leaders
- Possibly need to change bylaws to clarify youth membership
- Opportunity to work more closely with RE and Social Justice Committees

Goals for the Next Five Years

1. Establish the position of paid Membership Coordinator (at least half-time).
2. Encourage youth and young adult membership.
3. Reach out to young families and integrate children into the congregation.
4. Include new members in social activities.
5. Increase the diversity of the congregation.

Objectives

- To increase engaged membership, retain new members, encourage participation.
- To encourage diversity and youth membership.
- To provide opportunities for members to participate in the life of the community and feel a part of the community.

Resources

- We will need more involvement of volunteers for most of the goals.
- Financial resources will be needed for the paid position of Membership Coordinator. The current system of financial accounting makes it difficult to create one-year budgets based on a five-year plan.

Timeline/Plan

Goal 1: Membership Coordinator

Explore positions of Membership Coordinators in other UU congregations. It has been demonstrated that congregations with a full or part-time Membership Coordinator on staff have experienced growth at a rate two and three times that of other congregations. Apply for a Chalice Lighter grant to help with startup costs. At the end of five years have a paid position.

Activities to be done by the Membership Coordinator:

- Connect people
- Get to know new people
- Connect committees (Caring, Membership, RE)
- Have a way for people to suggest new activities
- Help people start a new activity
- Mentor program
- Keep track of visitors
- Organize UU101 and GTKUU

Goal 2: Encourage Youth & Young Adult Membership

- Work with YRUU and RE Committee to find out how to encourage young members.
- Need to find out first what Youth and Young Adults NEED.
- Develop a vibrant campus ministry.
- Possibly change the bylaws to specifically include younger members.

Goal 3: Reach Out to Young Families

- Consider having children in the service more than once a month.
- Could Mark do an introduction of each family when it does a chalice lighting?
- Encourage some young parents to be on the membership committee
- Encourage older members to provide dinners and attend Family Time.
- Encourage in-house secret PenPal program again.
- RE classes come into the service, be introduced and tell about their class (or teacher tells about).

Goal 4: Effort to include new members in social activities

- New member pot luck in May.
- Holiday parties – July 4 picnic, Easter egg hunt, Thanksgiving

- Centre Peace dinners – could we do something for Thanksgiving?
- Involve more families, teens, campus ministry.
- Change the current welcome email to a letter for visitors (people get too much email).

Goal 5: Diversity

- Need more diversity, but hard to reach out.
- Inter-personal relationships are really important.
- Need to wait for new bldg for more out-reach.
- Possibly we could encourage more inter-faith social justice work?
 - Connect with African Methodist Episcopal church in Bellefonte
 - Connect with Korean Church in State College

Appendix J: Hospitality Teams

Prepared by: Jason Bostron and Chuck Berry

The Hospitality Teams (HTs) are part of the community life cluster at UUFCC. The HTs are a group of members and visitors which work together to accomplish a variety of Sunday morning tasks from making coffee to greeting and ushering. Although many tasks get accomplished, more importantly, the HTs provide an opportunity for congregants to interact, engage, and form personal connections.

1. Committees and other groups represented by this LRP

- a. The HTs represent 5 groups of congregants: the Blessed Bees, Service Stars, Ladybugs, Ever-Red-Es, and Helping Hands.

2. Strengths and opportunities

Strengths:

- a. The HTs increase the connectedness of members and visitors. This is done on an inter-generational level.
- b. The HTs create a lively and welcoming atmosphere on Sunday mornings.
- c. The HTs get more people engaged. Long-time members have started attending again when asked to participate and infrequent attendees come when their team is on duty.
- d. The HTs incorporate newcomers into our community. They provide newcomers with a limited responsibility, allow visitors to get involved in the community, and provide a path to membership.
- e. The HTs empower members to make creative changes that improve our Sunday morning experience.

Opportunities:

- f. The HTs provide several fairly easy leadership positions. However, occasionally people serve beyond their interest level. We could be better at replacement planning.
- g. Some HTs have as many as 5 leaders, while others have only 3. We could increase the number of leaders on each team to a total of 4 or 5.
- h. Although some children serve on the teams, we could encourage more participation of children from elementary through high school.
- i. The HTs could serve as a support network, as a supplement to the caring committee, where members call each other if they haven't seen each other for a while. We could encourage more of this.
- j. The HTs, or a subset of people from the HTs, could help with hospitality for special events (e.g., set-up for Social Justice Seder) or regular events (e.g., Wonderful Soulful Wednesday).

3. Goals for the next five years

- a. Create and implement a plan for leader replacement and training.
- b. Increase the number of leaders on each team up to 4 or 5.
- c. Continue to have the HTs be a way for new (and long term!) congregants to get connected.
- d. Continue to share the HT idea in our region, and at a GA. Try to present once a year.
- e. Develop the website into a more useful resource for the HTs as well as for other congregations looking to start something similar to the HTs.

4. Objectives

- a. To continue to make being a part of the HTs as fun as possible, and not “work.” (goal a and b)
- b. To continue to provide the time and space for congregants to make personal connections. (goal c)
- c. To “spread the good news” about how HTs have changed our congregational life and culture, so that other congregations may benefit as well. (goal d)
- d. To make access to information about the HTs easy. (goal e)

5. Resources

- a. We currently have several hundred dollars in the annual budget. This money is used to buy new supplies and support team parties (babysitting, etc.)
- b. The current number of personnel/leaders is reasonable and should continue to work into the future.
- c. We do not expect to need further resources to accomplish our goals.

6. Timeline/Plan

- a. Create and outline a plan for leader replacement and training. (Fall 2011)
- b. Get feedback from HT leaders on this plan. (Winter 2011-2012)
- c. Begin to implement leadership plan. This plan should also increase the number of leaders per team to 4 or 5. (Spring 2012)
- d. Assess the effectiveness of the leadership plan regularly. (Spring 2013, 2014, 2015)
- e. Assess the connectedness of visitors and new members regularly. Invite them to join the HTs if not already participating. (Spring 2013, 2014, 2015)
- f. Rework the HT webpage to be a better resource for HT leaders and members. (Fall 2011)
- g. Rework the HT webpage to be a better resource for other congregations. (Spring 2012)
- h. Submit an application for a workshop at GA 2013. (Fall 2012)
- i. If accepted, prepare and present workshop at GA. (Summer 2013)

Appendix K: Caring Committee

Chair: Elaine Jurs

Goals

1. Continue the practice of contacting members/friends at least two times a year, other than the financial canvass (Remembership).
2. Establish a system of a phone call on a daily basis for those who live alone.
3. Continue to update lists of people who volunteer to provide meals and/or transportation.

Objectives

1. To provide opportunities for members/friends to participate in the life of the community and to feel a part of the UUFCC Community.
2. To carry out the Vision of the UUFCC which is to be a place where individuals feel safe, supported, empowered, challenged, and energized to share their talents, live their values and be a part of a beloved community.

Strengths

- Caring Committee is structured and has clear responsibilities.
- Caring Committee provides varied opportunities for people to connect with one another or to the larger community.

Challenges and Opportunities

- Could benefit from better use of Member/Friend gifts and talents
- Need to improve or create systems so people don't "fall through the cracks."

Resources

- The Caring Committee has committed member volunteers and offers of additional assistance from the Fellowship as needed.

Timeline/Plan

- Goals 1 & 2: Recruit volunteer members to begin making phone calls in the Fall of 2011. Organize list of members/friends who live alone and set up a phone tree for calling by Fall 2011.
- Goal 3: Offer sign-up sheets at UUFCC Committee Fairs in spring and fall 2011.

Appendix L: UUFCC HUUmanists

Chair: Chuck Berry

1. Committees and other groups represented by this LRP

- **Overall UUFCC HUUmanists.** This group will seldom meet; its purpose is to plan, support, and coordinate various Programs over time. Led by Chuck Berry
- **Believer Agnostic Atheist Study Group.** Film and moderated discussion during Lifelong Learning Hour (11:30 to 12:30) on the 2nd Sunday of most months. Led by Bob Seibel, Technology Rob Cole, Publicity Reinhard Graetzer
- **BAA Book Discussion Group.** Meets from 7:30 to 9:00 most Mondays, typically covering about a chapter per week. Led by Louise Goldschmidt
- **Fifth Friday Fellowship Films.** Most Fifth Fridays (about four times a year) we show and discuss a full-length film. Led by Rob Cole, Refreshments & Setup Reinhard Graetzer & Chuck Berry

Other Activities. The past two years on February 12 we showed an evolution-related movie and local author James Morrow moderated a discussion of it. We plan to continue this and other similar activities in the future; some may become regular and structured enough to have designated leaders and be ongoing “Programs.”

In addition, from time to time we will organize or support one-time activities. An example is helping the PSU Atheist Agnostic Association bring Sam Harris to speak at Schwab Auditorium on April 25. Such events fall under the general HUUmanist group rather than any specific subgroup.

2. Strengths and Opportunities

We currently have several things going for us:

- Many interested people on our email list
- Lots of ideas for possible future programs
- Willing leaders of programs
- Willing supporters of programs (publicity, technology, logistics)

Possible challenges and obstacles include the following:

- Burnout of leaders and supporters; no sign of this yet, of course
- Becoming spread too thin; we should try to not do too much too soon

3. Goals for the next five years

- a. **Connect More Participants.** Reach people through the UUFCC Newsletter, website, and other media; through publicity opportunities; by encouraging participants to introduce their friends; and through relationships with existing groups in the area.
- b. **Strengthen Relationships.** We will continue to bring people together at our activities, encourage them to interact with and get to know one another, and promote ongoing relationships between various local groups.
- c. **Protect the Vitality of Existing Programs.** We will identify and groom replacement Leaders and Supporters to maintain continuity and prevent burnout. We will not push for additional Programs in the near term.
- d. **Begin New Programs.** Toward the middle or end of the 5-year period, and perhaps sooner if opportunities arise, we will consider additional types of activities:
 - Focused one-time discussions
 - Series of classes, discussions, etc.
 - Social justice projects
 - Publicity and outreach events
 - Activities with other local and national groups

4. Objectives

HUUMANIST MISSION. The purposes of HUUMANIST Programs, as agreed upon at our organizational meeting November 11, 2010, include the following:

1. Entertain and educate participants
2. Clarify our ideas, improve communication of our values
3. Enhance the public image of Liberal Religion and Freethought
4. Attract more participants, including from outside UUFCC

We fully endorse and support UUFCC's overall Mission to "articulate and promote liberal religion, provide a spiritual home for persons who seek to know the truth for themselves, and inspire and empower individuals to live out their values and principles in the community, both within and beyond our walls."

Our Mission relates to the specific monitorable Goals above and to the Objectives outlined below.

- a. **Connect More Participants.** Many people at UUFCC, and even more in central Pennsylvania, could benefit from the Programs we run. We will be intentional in helping people find out about our Programs, welcoming them when they come, and helping them have meaningful, enjoyable experiences so that they will want to return.
- b. **Strengthen Relationships.** UUFCC, by offering facilities where people can get together, can introduce participants to other Fellowship programs, increase our diversity, strengthen the voice of liberal religion, and make our beacon shine more brightly.
- c. **Protect the Vitality of Existing Programs.** Maintaining strong, continuous leadership is critical to healthy, valuable Programs. We have the opportunity of starting fresh, and should not waste it by implicitly assuming our current Leaders and Supporters will

continue to serve “forever”; we will identify and train replacement people in both categories.

- d. **Begin New Programs.** Although the Programs we have already started seem like plenty for now, it is important to add fresh offerings from time to time. It is especially important to empower people who want to begin something new. We should also modify existing programs as appropriate to enliven them if they begin to grow stale. And we need not continue the same Programs if they have served their purpose and are no longer enthusiastically supported.

5. Resources

- a. **People.** Our Programs should not require significant support from Staff, though we would delightedly include Staff people if they are interested.
- b. **Money.** Our Programs are inexpensive; we have asked only for a Budget of \$100 per year to rent films and movies.
- c. **Facilities.** Existing space in the building is sufficient for our expected needs. However, a **projector and screen** permanently mounted in the Sanctuary would make our visual programs much easier to prepare for, to clean up after, and to see while they are in progress. Shades to cover the high windows would also improve visibility when it is still light outside. We have not asked for money for these in our Budget, but add our voice to those of several other Programs that would benefit from this capability.

6. Timeline/Plan

- a. **Connect More Participants.** Increase the number of e-addresses on our current list from about 80 to 120 by 2012, 130 by 2013, 140 by 2014, 150 to 2015, and 160 by 2016.
- b. **Strengthen Relationships.** By 2016, we will have included at least 80 non-UUs at one or more of our Programs, have welcomed at least 40 to non-HUUmanist Programs at the Fellowship, and at least 40 UUs will have attended other Freethought activities in the area.
- c. **Protect the Vitality of Existing Programs.** By 2012, we will have officially designated “understudies” in the Leader and Support roles of all Programs. By 2016, we will have new people in at least half of these positions.
- d. **Begin New Programs.** By 2016, we will have run events in at least four of the five areas listed in section 3D above.

Appendix M: Games Night

Chair: Cat Haverback

The UUFCC Game Night group offers folks a way to connect and build fellowship, including more intergenerational mixing, such as twenty-somethings engaging with sixty-somethings, than occurs in many UUFCC programs. Our program also serves as a means of outreach to the community, attracting people to the fellowship that might not otherwise get to know UU, some of whom sooner or later find themselves joining a hospitality team, participating in the service auction, and getting involved in the Fellowship to a much greater extent than they would likely have done otherwise.

We would like to see both of these benefits continue and expand in the upcoming months and years. We currently hold game nights two to three times per month, and have talked about increasing the frequency to weekly. As we expand the building, making space limitations less of a concern, holding more frequent game nights will be a more reasonable expectation than it has been in the past. We want to increase attendance, which we hope to do partly through increased publicity. Games have become an important part of Fellowship culture, and we wish to expand the benefits of this phenomenon in the best ways that we can.

Appendix N: Property Plan

BUILDING EXTERIOR AND GROUNDS REPORT FOR LONG-RANGE PLANNING

Ronald A. Smith

January 24, 2011

The major long-range concern is somewhat short-range at the present time--the building expansion to the east of the present Social Room. Extension may mean eliminating the much under-used Amphitheatre to the east of the Social Room near the tall grasses. The expansion also means more water run-off and the need to accommodate this run-off to meet code. This may mean altering the swale that begins on the south side of the present buildings and runs to the water retention pond to the northeast corner of our site.

The Fellowship needs to consider what to do with two memorial trees planted in the vicinity of the building site.

There has been talk about building an electric generating windmill on the property. If this is accomplished the structure will be no more than 50 feet high (by College Township Code), and is required to be located in the middle of our property (by Code) to the east of the present religious education wing. We will have to determine 1) if this makes sense economically or just symbolically, and 2) if a windmill will disturb our neighbors and, just as importantly, will it disturb our own programs.

In the future we must judge our parking needs as we grow. If additional parking is needed, it is likely to cost at least \$1,000/space. We presently have about 75 parking spaces. The logical place to expand parking is to the east of the lower parking lot, in the direction of the shed and small basketball court.

Some group or the Board should determine what we should do for the Labyrinth on the other side of the Amphitheatre. We either need to have an individual or committee to keep it looking good, or place chips or crushed stone on the paths so that it does not continue to be a weed path. Every year it becomes unsightly because those who built it in the 1990s did not take the given advice to use flat rocks imbedded in the soil so that it could be mowed over easily.

In the future, we may want to raise the question of a Memorial Garden once more. It was suggested a decade or more ago that the logical place for it was along the cherry tree line between the Labyrinth and the Amphitheatre.

We will have to decide where to put the present shed adjacent to the Social Room when the building addition is begun. Once moved, it would be a logical building to house the lawn tractor and outdoor furniture during the winter.

The question of the children's garden, begun three or four years ago near the retention pond, should be raised. If it is unattended, as it was during the Summer of 2010, should it be once

again returned to grass? Should this be a project of the Religious Education program, or should it be eliminated?

As a potential project, I would like to see a stone fireplace built in the southeast corner of our property, past the Labyrinth. This could be considered by the Board.

Appendix O: Board of Trustees

Ongoing:

Many principles guide the ongoing work of the Board of the UUFCC. We reaffirm two important ones here. We commit ourselves to:

- Welcome everyone into our Fellowship
- Conduct the business of the Fellowship in a sound fiscal manner

Initiatives:

1. Create a Leadership Development Plan that defines a path to leadership for our members.

Implementation: Include this initiative on the agenda for the next Board retreat, so we have time to explore this thoughtfully. Invite current and past chairs of the nominating committee to contribute their ideas. *Fall 2011*

Contact JPD District to see if there is someone who can conduct a workshop about an intentional leadership development process. *Winter 2012*

Contact other congregations who have created leadership development plans to see what works, what doesn't. Many other congregations have melded leadership development into their nominating committee work. Others have two separate committees, both reporting to the Board. *Spring 2013*

2. Promote a multi-generational atmosphere throughout congregational life.

Implementation: Be a cheerleader for RE. Maintain open lines of communication. Board members attend at least one RE class per year, either as visitor or resource (expand to larger congregation later?). Involve Board in RE Sunday to recognize the RE teachers and program. *Ongoing*

The Board will send an explicit message to the Program Council regarding the inclusiveness of people of all ages in existing and developing programs. *Fall 2011*

3. Ensure that we use our new program space to support our mission and vision, both for internal use and for outside groups using the facilities.

Implementation: Oversee appropriate committees. *Ongoing*

4. Oversee the review and update of personnel policies by the personnel committee. *Fall 2012*

5. Focus our activities so we can do what we do well; avoid spreading our efforts too thin for effectiveness. Monitor appropriateness and adequacy of current organizational structure to make sure our governance is as effective and as responsive as possible to our membership. *Ongoing.*

Implementation: Assess how the Fellowship's activities advance our vision and mission and enhance spiritual growth. *Fall 2013*

Reduce, prioritize and organize committees, activities and programs.
Discontinue activities that no longer serve a purpose. *Fall 2013*

6. Ensure that the UUFCC continues to strike an appropriate balance between inward- and outward- focused activities and programs.

Implementation: Oversee appropriate committees. *Ongoing*

Appendix P: Communications

Communications Cluster Report to LRP

Communications covers the website, newsletter, e-news, advertising, publicity, lobby signs and bulletin boards – managed by several groups. This report also identifies the growing use of list-serves, Facebook, and other e-venues by members to connect with others in the fellowship and the wider community. Communications objectives support the fellowship mission.

Strengths: We expend great effort and have great success communicating *within* the fellowship. The newsletter, in particular, consistently showcases the values, principles, social life, and diversity of activities within the congregation. It is well-read and valued by all.

Weaknesses: We are not as successful in *outreach* to the community outside our walls. Members and regular visitors know what the UUFCC is and what we stand for... but outsiders do not.

Objectives: Broaden awareness and recognition of the fellowship within the community; encourage people to visit; target those most likely to find a spiritual home here with messages that convey liberal religious values; continue and encourage all communications venues that connect members and potential members to programs and activities they find meaningful.

Opportunity: The building expansion represents the fellowship's growth and success and an opportunity to explain how and why it meets the needs of more people in the community.

8. Publicity Goals:

Put greater effort into getting more exposure of UUFCC name, values, and activities -- in print, broadcast, and online media: calendar listings of events and programs, news coverage of special events, opinion pieces, inclusion in trend stories and by-lined columns, captioned photos, member-written stories, postings on Facebook.

The goal isn't necessarily to draw people to a particular event, but to help them connect who we are to what we do. Unlike paid advertising, publicity through editorial exposure costs nothing.

UU Can Get Publicity! is a comprehensive list of contacts and submission requirements for our local media. Copies are available in the office or thru michalst43@gmail.com.

Challenges:

We lose opportunities because we don't have a system for disseminating information in advance.

Resources needed:

Someone to submit publicity material in different formats to media on behalf of all the program coordinators and committee chairs who want publicity.

2. Advertising Goals:

Determine best use of budget to reach a target audience; develop messages to establish recognition/fellowship mission/flag those most likely find a home here; create a consistent look for UUFCC ads; budget enough frequency to create a familiar and lasting impression.

Challenges: \$800 budget not enough to support these goals. See plan B. (Assembly of God spends \$3300 for a small space campaign in the CDT, 1 ad per week, 52 wks per year. We could do comparable campaign for \$2400. See plan A).

Resources Needed: A creative team, preferably new members, to develop ads.

Plan A: \$2400 for 60 small-space ads in CDT. 6-7 in one week, one week per month for 10 months.

Plan B: \$800 in 2010-2011 budget will extend WPSU-FM sponsorship spots for 3 months, Oct-Dec 2011. Review best use of 2011-2012 budget.

Advertising group: Michal Stump, Laura Brown, Membership Committee, and others recruited for brainstorming sessions. Graphic designer, Karl Leitzel (not UUFCC member) charges a modest fee for services.

Resources needed:

A creative/team, preferably new members, to develop ads.

3. WPSU-FM Underwriting

Underwriting sponsorship began Jan. 2010 with a year's contract for approx 30, 10-second sponsorship identification spots per month in peak drive times. Underwriting funded by member contributions. Less fundraising was done for 2011 because of capital campaign.

Goal: Keep UUFCC on the air! This is our market. Rotate new messages.
WPSU-coordinator (Sue Smith/Michal Stump)

4. UU Connections Newsletter

Excellent continuity and quality month after month. Produced and mailed on time. Editorial/production team handle issues as they arise. 160 issues mailed each month to subscribers. 40 additional copies mailed back to UUFCC to comply with PO requirements for minimum 200 pieces. Cost of mailing is approx. \$65 per month. Newsletter is e-mailed to a larger list-serve of members, friends visitors.

Goal: Increase hard-copy distribution of the newsletter, our most comprehensive and impressive 'marketing-communications' piece; Add at least 40 'real' subscribers to mailing list.

Newsletter Team: Peggy Halleck/Audrey Barner (office) compile items, Amanda Richards/Chas Brua -editing, Penny Eifrig/ Michal Keune-design and layout, Martha & John Kolln lable/mail, Audrey Barnerprepares hardcopy/.

5. Website -

Virtually all newcomers checkout our website before they come. We have an opportunity to make it a stronger marketing tool:

Challenges- Website content is not always up-to-date. Some people assume what they send in to the newsletter will find its way onto the website as well. That does not happen. Webmaster does not make editorial decisions about what to post, where to post it, or what to remove. Nor does she want to edit copy for the web. There is no system in place to update material or remove old pages unless specific instructions are given by the person who submitted it. Committee reps generally do not contribute material for the website as they do for the newsletter. Nor do they monitor their pages to update material. Consequently, the website is not used well by members and conveys much bad information to visitors.

- Architecture and design of website is cumbersome and not visitor-friendly. Events are not always well-posted or easy to find.

Web-Content sub-committee (Laura Brown, Julie VanEerden, Matt Karasak, Michal Stump, Peggy Halleck, Stevie Rocco) met several times during 2008-2010 to discuss possible changes; some changes were made. Stevie Rocco & Paul Kletchka are working on uufcc.net website. more people.

6. Incorporate more elements into the website that show more of what visitors seek:

warmth, joy and support of a lively community; easy access to their interests.

7. E-News for UUs

Weekly summary of upcoming events, meetings, services and other fellowship business. fellowship activities and events in easy-to-scan format. Usually 10-12 brief items.

Excellent continuity week-to-week.

E-News Team: Submissions by members, compiled by Audrey Barner/office, reviewed by Mark Hayes/Jean Wiant prior to distribution.

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8. Email, List serves and Other E- venues for Social Activities

Virtually every program in the fellowship uses an email group list to connect members with common interests and share information. Huumanist, Gamer, Diversity and other e-lists that originate inside the fellowship often extend to a wider circle outside our walls.

We use email lists to coordinate informal social and cultural outings as well. “2nd Thursday Movie“ people decide on a movie and where to meet for coffee afterwards. “WildWomen” get together for music and dancing at Elk Creek Cafe or theatre downtown.

UUNeedtoKnow is list serve that serves as a general e-bulletin board for members to post non-fellowship business: dog-sitter wanted, lodging needed, yard sales, theatre tickets for sale, concerts by friends. All members can post and receive it once they sign up.

Appendix Q: Adult Enrichment

Adult Enrichment Plan

Date: February, 2011

Planning timeline: 2011-2015

Current contact: Jean Wiant, CRE, DLRE and/or Rev. Mark Hayes

Goals for the Next Five Years:

1. Conduct a survey of the members and friends of UUFCC to determine interest areas, willingness to serve on the ARE Committee, and/or willingness to facilitate ARE classes
2. Strengthen the ARE Committee by increasing the committee membership, and meeting regularly so that the committee drives the ARE program
3. Identify subject areas or guiding principles to include in the ARE programming and a rotation schedule that will meet everyone's needs: examples include:
 - a. Body, Mind, spirit
 - b. UU Identity, World Religions, Jewish and Christian Heritage
 - c. Deepening Faith, Living Well, Enacting Justice, Spiritual Practice
 - d. Other?

Objectives:

1. To define Adult Enrichment in the context of UUFCC members and friends and determine their levels of interest in developing the ARE program.
2. To oversee the ARE program, develop a plan, recruit and train facilitators, and evaluate programming
3. To develop a cohesive ARE plan with a sequence of classes so that it can become a coordinated program.

Strengths:

1. We have well-educated people with a wealth of knowledge to share.
2. We have several time slots open for adult enrichment classes.
3. We have numerous one-person connections to community organizations who could bring in guest speakers to enhance the ARE program.

Challenges:

1. We need to develop a systematic plan for Faith Development that includes the Sunday morning worship services, Adult Enrichment, and Guest speakers.
2. We need a fully functioning ARE Committee that meets regularly and is actively driving the ARE program.
3. We need funds for resources and curriculum.
4. We need to prioritize as a congregation, where we want to focus our efforts in Adult Enrichment – what are our interests, what can we share, how can we help?

Resources:

1. Identify human resources – current and required to achieve our goals.
2. Identify financial resources – current and required to achieve our goals.
Current budget for ARE is \$100 for 2010/2011 fiscal year

Timeline:

1. Fall, 2011 – conduct ARE survey
2. Winter, 2012 and ongoing – strengthen the ARE Committee
3. Spring, 2012 and ongoing – ARE Committee will review surveys, identify areas of interest, develop a plan for Faith Development for adult learners, identify and train facilitators, schedule classes, evaluate the ARE program yearly.

Appendix R: UUFCC Activities During 2010-2011

The following is a list of some of the activities that took place during the 2010-2011 church year. Please realize this list may not be comprehensive, as Fellowship programs are constantly changing.

- A Book for every Child
- Breakfast with the Board
- Capital Campaign Kick-off and Talent Show
- Chili Cookoff sponsored by the RE Committee
- Coming of Age program for Junior High youth
- Family Movie Night sponsored by the REC and the Family Time planning committee
- Family-Friendly TGIF
- Field Trip to York for Association Sunday
- First Sunday Plate Collections
- Freedom Seder
- Habitat for Humanity Workday
- Holiday Pageant on Christmas Eve
- Hospitality Teams
- Increased visibility through advertising in Voices and the Underwriting Campaign at WPSU
- Leadership Development Workshop with Dr. Richard Speck
- Memorial Services Team: help in planning services; handbook
- New Member Services Team
- New Orleans Social Justice Trip
- Mystery Pals activity to connect children with adult members of the Fellowship
- RE Teacher Appreciation Luncheon
- Saturday Night Soiree
- Service Auction
- Soulful Sundown services
- Spring Follies and Musicale
- TGIF
- Tree Trimming Event with a light lunch and holiday music by the UUFCC Band
- Untangled Strings Concerts
- Winterfest Concerts
- Yard Sale
- YRUU worship service

Appendix Q: Campus Ministry

Prepared by: Jason Bostron

1. Create and implement a plan to foster the rechartering and growth of UU campus ministry on the Penn State University Park campus.
2. Create and implement programs supported by the UUFCC with undergraduate students as the intended audience. These programs must meet students' needs of time, location, and content.
3. Facilitate a presence at the Penn State University Park beginning-of-year activities fair in Fall 2012 and every year thereafter.
4. Develop the website into a more useful resource for Penn State students.

Campus Ministry (CM) is not something we should facilitate, but something we need to facilitate. We currently do not have a strong connection to Penn State and are not supporting a CM group. For this and other reasons, a Unitarian Universalist CM group is not alive and thriving at Penn State University Park. This is an opportunity for congregants of the UUFCC to be our faith in the world, and provide a much needed spiritual home for students.

CM is a vital part of a thriving, fully multi-generational community. There is currently a gap in our UU community because (undergraduate) students are not involved. To give CM a high chance of success, it must be accepted as an integral part of the vision, life, and identity of the UUFCC. This means that CM should rank among our identities with Sunday worship, religious education, and social justice.

More importantly than the enrichment to our UU community that students will bring, CM fills an inherent need that students have. College students often leave home for the first time and are exposed to a variety of new experiences. CM provides a spiritual home and a group of friends that can be a positive force in decision making. This grounding helps students progress through the best times and hardest times of this transitory period. Additionally, CM literally saves lives. Andrew Mertz, Director of Youth and Young Adult Programs in the JPD has estimated that about one in thirty (1 in 30) participants in CM will openly share that they wouldn't be here if it weren't for their CM student group.

For the 2010-2011 academic year, Penn State had approximately 40,000 undergraduate and 5,000 graduate students on the University Park (State College) campus. The US Census indicates that the State College Borough has a population of about 40,000 (in 2010). It is clear that Penn State students represent a large portion of individuals living in the State College area. By not working as hard as possible to develop ideas and facilitate solutions, we are failing to minister to this large part of our State College community.

In facilitating CM, and creating appropriate programming for students, we must remember that students, especially undergraduates, have different needs than our adult members or children. We need to support programming that fits their needs, in terms of location, time, and content. This means programs or services during the week, with dinner, and/or with a format that we currently do not provide. We need to adapt our style to meet the needs and content desired by the student population. There are regional and national resources available to help us learn how to do this.

Finally, the congregation needs to support a group of individuals that will serve as a task force to facilitate the development of CM, and an individual(s) to act as advisor to the on-campus club and liaison to the congregation.

1. Strengths and opportunities

Strengths:

- a. The UUFCC community is very welcoming to newcomers.
- b. The UUFCC has a system in place to attract visitors, in general.
- c. The UUFCC is a vibrant, alive congregation with many programs.

Opportunities:

- d. To reach out to many individuals who would feel comfortable and excited about our faith. These are individuals that may currently be unaware of the UU faith.
- e. To minister to Penn State students, who represent a large part of our local community, and who are in need of ministry.
- f. To support a thriving campus ministry that will provide a spiritual home for its members, engage the wider community in interfaith dialogue, participate in social action projects with (and without) other campus clubs, and other activities.
- g. To foster the rechartering and growth of the Unitarian Universalist Student club.
- h. To positively change and save lives.
- i. To meet the students where they are, physically, closer to campus. To find a convenient meeting space near campus.

2. Goals for the next five years

- a. Create and implement a plan to foster the rechartering and growth of UU campus ministry on the Penn State University Park campus.
- b. Create and implement programs supported by the UUFCC with undergraduate students as the intended audience. These programs must meet students' needs of time, location, and content.
- c. Facilitate a presence at the Penn State University Park beginning-of-year activities fair in Fall 2012 and every year thereafter.
- d. Develop the website into a more useful resource for Penn State students.

3. Objectives

- a. To facilitate the renewal and growth of UU campus ministry locally. (goal a)
- b. To provide programs for and engage undergraduate students. (goal b)
- c. To make the UU student club visible to potential members. (goal c and d)

4. Resources

- a. We will need a group of active, excited congregants that are eager to facilitate CM and a variety of programming directed toward students.
- b. We have regional and national CM and young adult experts to consult for advice.
- c. We have CM leaders from other schools to consult for advice.
- d. We have Pasquerilla Spiritual Center staff (and other religious clubs) to consult for advice.
- e. We have ConnectUU.org and other online resources to identify potentially interested

students.

5. Timeline/Plan

- a. 2011-2012: Create task force to collect resources and study the issue. Identify initial advisor and liaison. Formally re-establish the UU Student club.
- b. 2012-2013: Create presence at the beginning-of-year activities fair at Penn State in Fall of 2012 to advertise group. Support fledgling group. Begin to implement UUFCC-sponsored activities for students.
- c. 2013-2014 and beyond: Continue presence at beginning-of-year activities fair. Continue active support. Implement a variety of activities for students. Establish a program location near (walkable to) campus. Support, financially and otherwise, UU students on social action trip(s), participation in regional and national events and conferences, etc.